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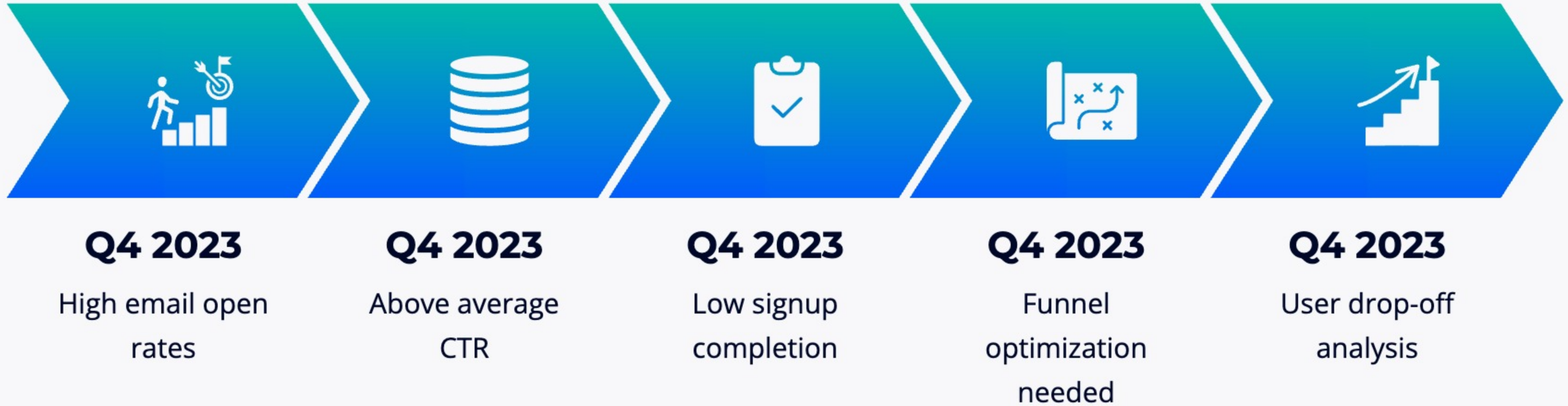
Onboarding Funnel Audit

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Current Situation Overview



Email engagement is high, but signups lag significantly.

The Conversion Challenge



Users abandon the signup process, highlighting engagement issues.

Current Email Performance

60%

Open rate significantly above industry average

10%

Click-through rate showing positive engagement

2 hours

Optimal email timing post-signup



Landing Page Analysis



Email Context Disconnect

The generic product page lacks personalization, causing high abandonment rates.



Split-Screen Visual

A split-screen visual shows the email vs. landing page disconnect clearly.

Industry Benchmarks

Our Performance		B2B SaaS Standards	
Open rates at 60%		Open rates at 20-30%	
CTR at 10%		CTR at 2-5%	
Signup completion at 3%		Signup completion at 1-2%	
Above average performance		Room for significant improvement	

We outperform industry benchmarks but still have room for improvement.

Root Cause Analysis



User Drop-off

Users drop off after clicking due to a lack of personalized landing page experience.



Generic Content

Generic content leads to user disengagement and increased drop-off rates.



Value Proposition

No clear value proposition continuation from email results in confusion.



Social Proof

Missing social proof and trust signals contribute to user hesitation.



Fishbone Diagram

A fishbone diagram shows contributing factors to user drop-off.



Engagement Strategies

Implement engagement strategies to enhance user experience and retention.

User Experience Gap



Expectation vs. Reality

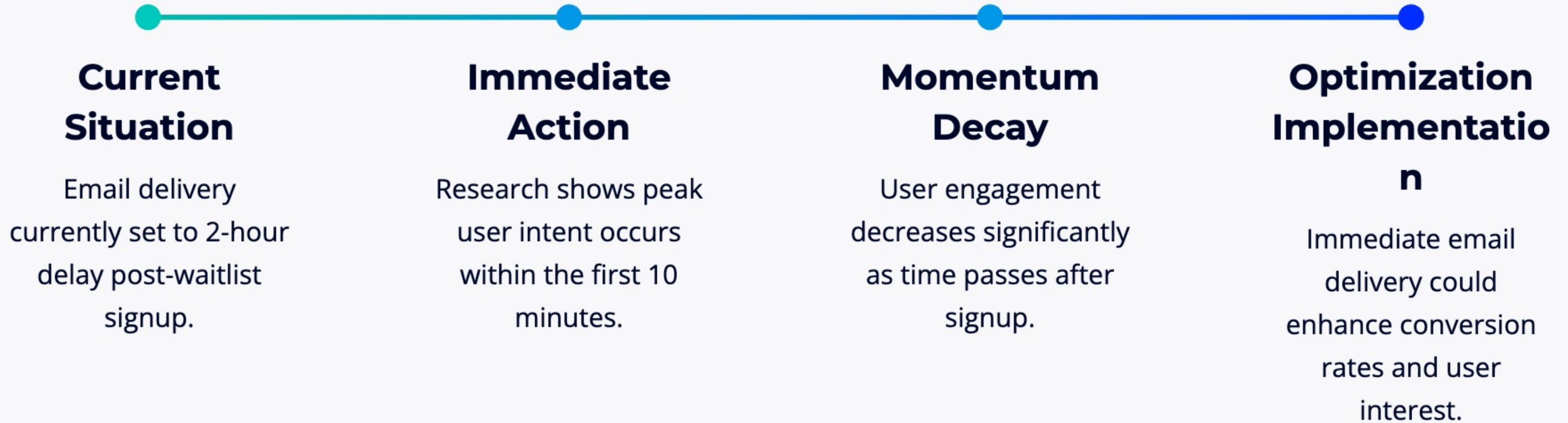
The email creates expectation, while the landing page provides a generic experience.



Complex Forms

Forms may be too long or complex for immediate conversion.

Timing Optimization Opportunity



Recommended Solutions - Personalization



Relevant Experiences

Matching landing page content to the user's demonstrated interest and behavior.



Behavioral Referencing

Referencing user's previous behavior or segment for tailored experiences.



Customized Messaging

Customizing messaging based on the user's signup source for relevance.



Contextual Continuation

Creating contextual continuation from email to landing page for seamless experience.



Dynamic Content

A mockup of a personalized landing page with dynamic content is included.

Form Optimization Roadmap



Recommended Solutions - Social Proof



User Metrics

Show user counts or success metrics to highlight popularity.



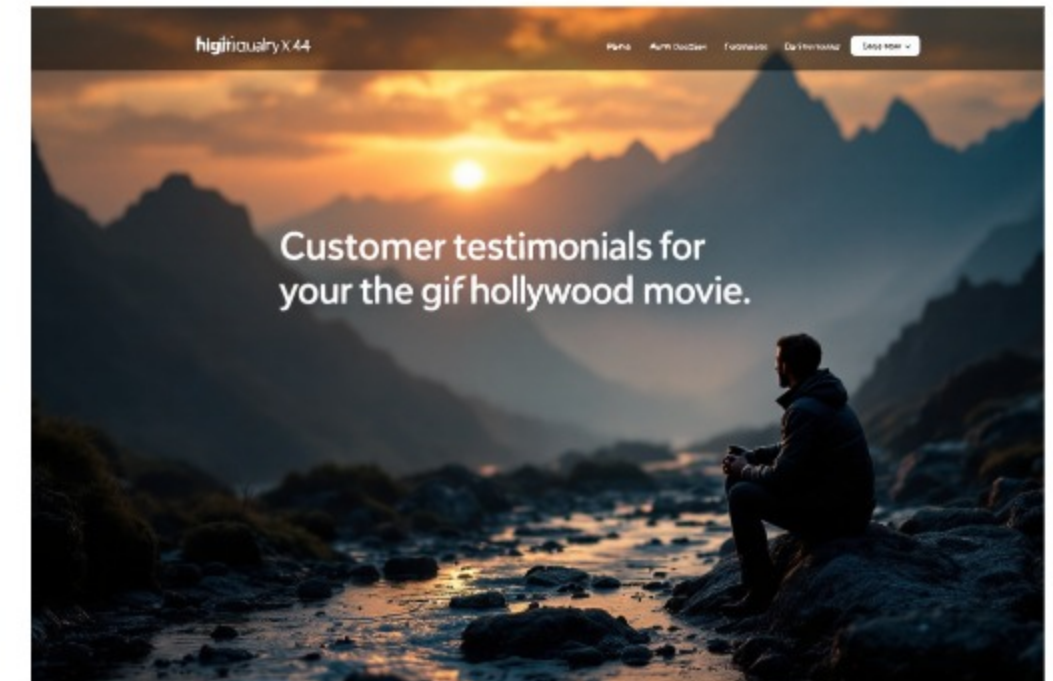
Customer Testimonials

Adding testimonials builds trust and shows user satisfaction.







Brand Logos

Display recognizable logos to enhance credibility and reliability.



Recommended Solutions - CTA Optimization

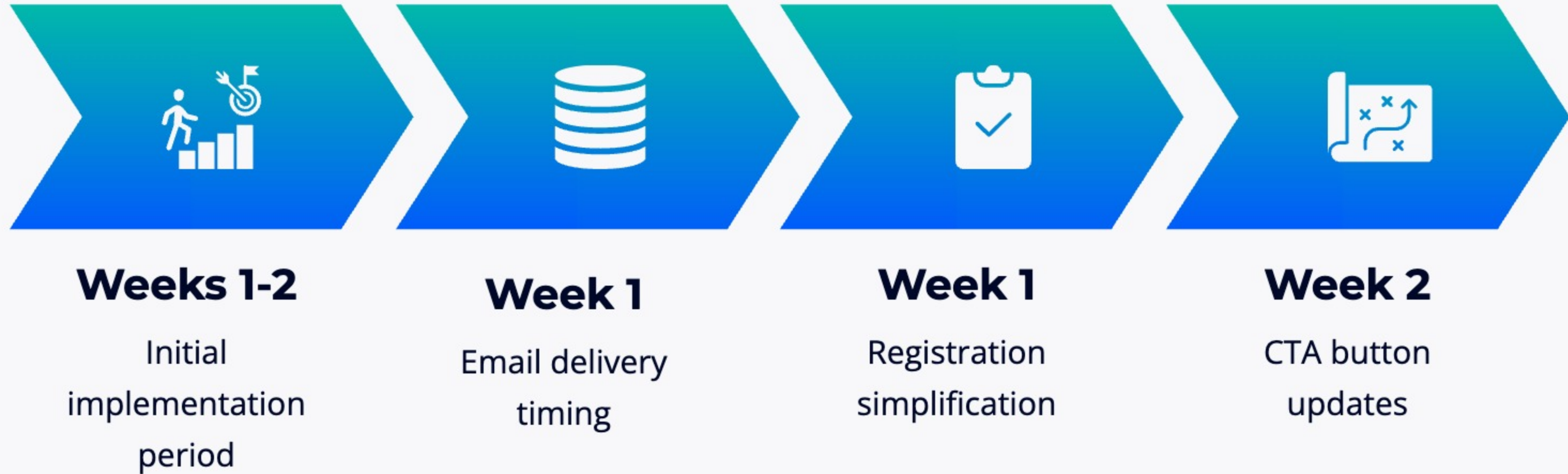
Improving Call-to-Action Elements		A/B Test Comparison
Change from 'Learn More' to 'Start Now'		Create urgency matching email subject line
Use action-oriented language		Make buttons prominent and clickable
Action-oriented, benefit-focused language		A/B test comparison of different CTA buttons
Create urgency matching email subject line		Change from 'Learn More' to 'Start Now'

Enhancing CTA effectiveness leads to improved user engagement and conversion rates.



An onboarding video enhances user engagement and demonstrates product value effectively.

Implementation Plan - Phase 1



Quick wins focus on immediate conversion improvements.

Implementation Plan - Phase 2



Measurement and Tracking

100%

Analytics Tools Deployed

All tools are operational and tracking.

4

Tracking Methods

Includes heatmaps and session replays.

1

Funnel Monitored

Single conversion funnel under review.

1

Dashboard Mockup

Analytics dashboard visual available.

Success Metrics

Expected outcomes include a target of 2-3x increase in completed registrations, improved user experience and satisfaction, better alignment of email and landing page messaging, and enhanced data visibility for future optimizations.



Registrations Increase

2-3x



User Satisfaction

Improved



Messaging Alignment

Better



Data Visibility

Enhanced

Next Steps

01

Development Team

Implement tracking and form changes for improved user experience.

02

Marketing Team

Create personalized landing page content to enhance engagement.

03

Design Team

Develop the onboarding video to facilitate user onboarding process.

04

Analytics Team

Set up the measurement framework to evaluate performance metrics.

Thank you for your time and engagement!



References

- [1] Onboarding Email Conversion Optimization - Slide Deck Outline.pdf