

Designing a Self-Onboarding Feature for a SaaS Application

Figma Prototype & UX Process
Project Defense Presentation

Introduction

- ▶ This project focuses on designing and prototyping a self-onboarding feature for a SaaS application.
- ▶ The goal is to enhance first-time user experience, reduce time-to-value, and improve overall adoption.
- ▶ Onboarding is a critical step in SaaS products because it sets the tone for user retention and satisfaction.
- ▶ Through this project, a responsive and user-friendly onboarding solution was created using Figma.
- ▶ The feature is designed to guide users through the product's key functions in a simple, intuitive manner.

Project Goal

- ▶ The primary goal of this project is to design and prototype a user-friendly self-onboarding feature for a SaaS application. This onboarding feature is aimed at improving user adoption by helping users quickly understand the product's value, reducing time-to-value by minimizing confusion during first use, and enhancing the overall first-time user experience. The design also focuses on creating a smooth, intuitive flow that allows users to set up their accounts, explore key features, and personalize their dashboards seamlessly. This ensures that new users achieve success quickly and continue using the product.

User Research

- ▶ Research was carried out to understand the challenges faced by first-time users in SaaS applications.
- ▶ Key findings:
 - ▶ - Users often abandon apps if value is not demonstrated quickly.
 - ▶ - Confusing navigation leads to frustration.
 - ▶ - Different industries and roles require personalized experiences.
 - ▶ - Users prefer simple, guided walkthroughs over lengthy tutorials.
- ▶ These insights shaped the design direction of the onboarding feature

Personas & Journey Mapping

- ▶ Persona Example:
- ▶ Name: Sarah Johnson
- ▶ Role: Marketing Manager
- ▶ Pain Points: Limited time to explore software, needs quick results.
- ▶ Goals: Wants to adopt a tool that saves time and boosts productivity.
- ▶ Expectations: Clear navigation, personalized setup, and simple task creation.
- ▶ This persona reflects the needs of many first-time SaaS users.

User journey map

- ▶ The user journey visualizes Sarah's onboarding experience:
 - ▶ 1. Signs up and logs in.
 - ▶ 2. Guided setup (role, industry, team size).
 - ▶ 3. Takes a quick product tour.
 - ▶ 4. Customizes dashboard.
 - ▶ 5. Creates first task.
 - ▶ 6. Feels confident using the tool.
- ▶ This journey highlights critical moments of user delight and potential friction.

Self-Onboarding Flow Design

- ▶ Welcome screen with product value proposition.
- ▶ Role, industry, and team size selection for personalization.
- ▶ Interactive 'Take a Tour' product guide.
- ▶ Dashboard overview highlighting key features.
- ▶ First task creation guidance.

Problem Statement

- ▶ Many SaaS platforms face challenges during the onboarding stage where new users struggle to quickly understand the platform. This results in high drop-off rates, poor adoption, and delays in achieving value from the software. Users often feel overwhelmed by complex features, leading to frustration. Without proper onboarding, the likelihood of churn increases significantly. This project addresses the problem by designing a simple, intuitive, and engaging self-onboarding feature that reduces complexity, guides users step-by-step, and ensures they understand the value of the application from the very first interaction.

Design & Prototypes

- ▶ Wireframes and high-fidelity prototypes were developed in Figma.
- ▶ Key design strategies:
 - ▶ - Clean, minimalistic UI with focus on clarity.
 - ▶ - Use of calming, trustworthy colors (blue, green, white).
 - ▶ - Typography hierarchy for readability.
 - ▶ - Interactive elements for guidance (tooltips, progress bars).
 - ▶ - Mobile responsiveness for accessibility.
- ▶ The prototype demonstrates the full onboarding flow.

Conclusion

- ▶ The self-onboarding feature solves the problem of poor first-time user experience in SaaS applications.
- ▶ It improves adoption, reduces time-to-value, and enhances retention.
- ▶ The design process included user research, personas, journey maps, wireframes, and prototypes.
- ▶ A responsive UI was created to cater to both web and mobile users.
- ▶ Through usability testing, the onboarding flow was refined for clarity and ease.
- ▶ This project demonstrates how design thinking can transform SaaS onboarding.

Thank you!!!!!!!!!!!!!!