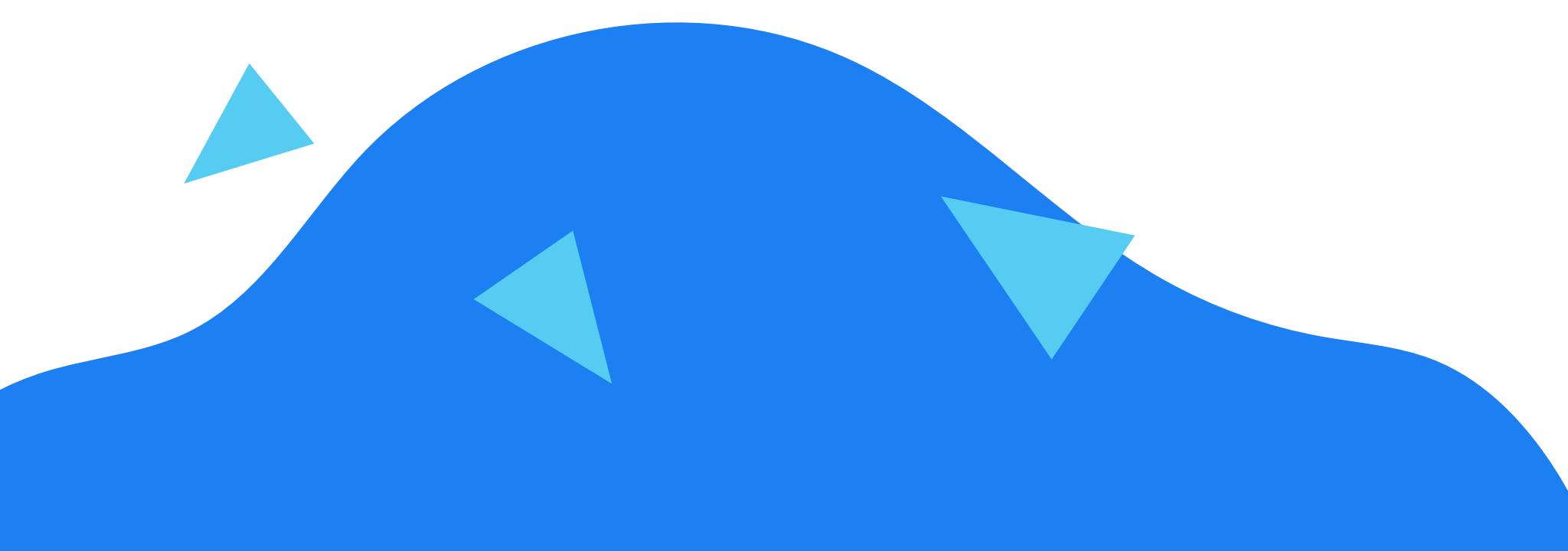
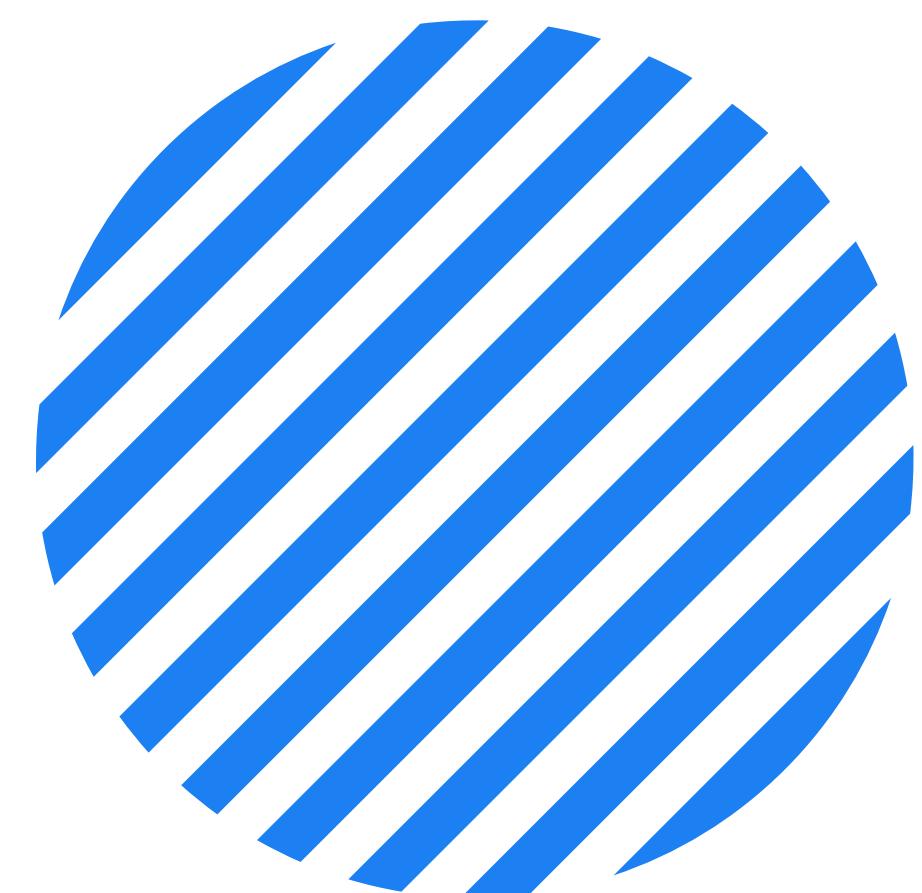


Case study:

Morning Brew onboarding experience



Product Designer



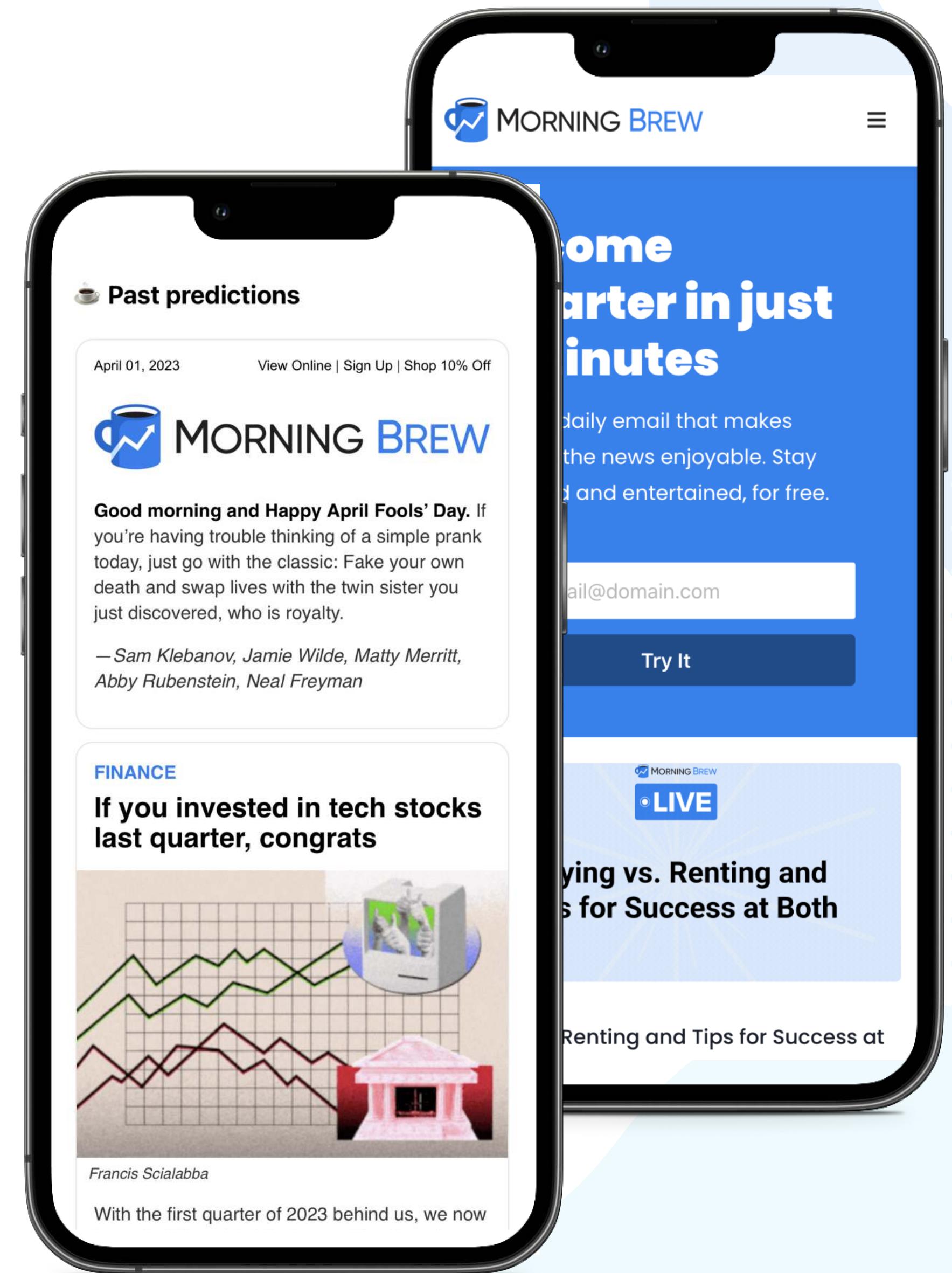
Introduction

What is Morning Brew?

Morning Brew is a daily email newsletter that provides readers with a concise, witty, and informative overview of the latest news in the business world. The newsletter covers a variety of topics, including finance, technology, politics, and more, and is targeted towards young professionals who want to stay up-to-date with the latest developments in the business world.

Audience / Users

- Busy professional who want to keep up with the latest business news and world happenings (in only 5-10 minutes a day)
- Young CEOs / entrepreneurs who often check blogs, news, and listen to podcasts on the latest financial and business news
- Tech-savvy professionals who read tech and business news
- Anyone who enjoys entrepreneurship or just learning about business and how it relates to all aspects of the world like culture, health, etc.
- New entrepreneurs who focused on companies and startups that like to listen about small businesses



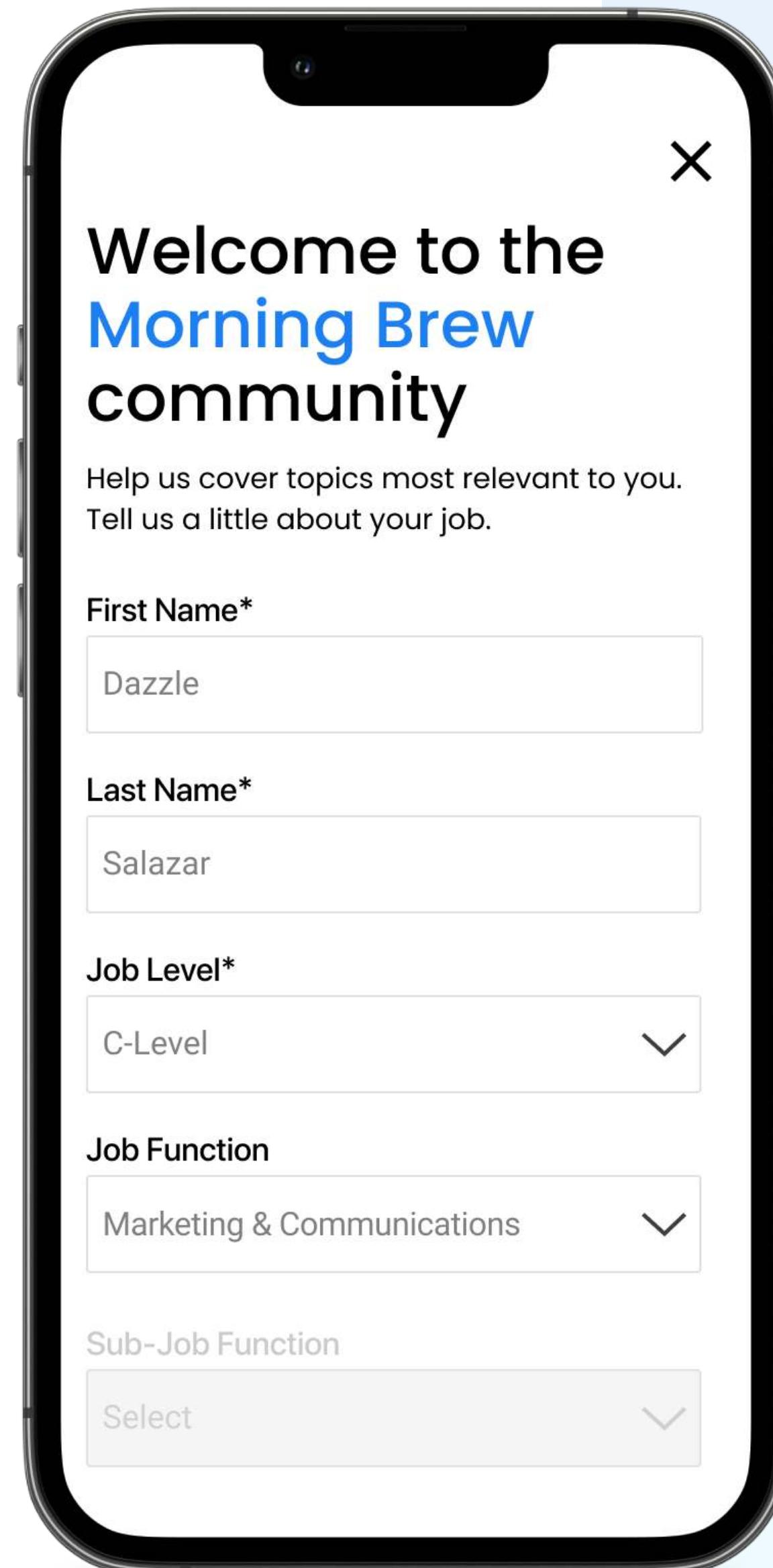
Onboarding

Problem Statement:

The onboarding process for Morning Brew is currently not optimized to encourage new users to signup and engage with our newsletter. This has resulted in a low conversion rate of website visitors to registered users, ultimately leading to a negative impact on our business growth and revenue.

Below are some that I've listed of the critical issues that were causing the friction, and what stands out to me as the main pain points:

- 1. Lack of clarity:** The onboarding process is not clearly defined and can be confusing for new users, leading to drop-offs and frustration.
- 2. Lengthy registration process:** The current registration process is lengthy and time-consuming, which discourages users from completing the sign-up process.
- 3. Uninspiring copywriting:** The language used in the sign-up process is dry and uninteresting.
- 4. Inadequate communication:** We do not effectively communicate the value and benefits of our daily newsletter to potential users during the onboarding process.
- 5. Lack of visual appeal:** Sign-up process is just a basic form without any imagery or visual elements; it's a bit dull and uninteresting.
- 6. No incentives:** We do not offer enough incentives or rewards to encourage users to sign up and engage with our platform.



Onboarding

Objectives

Our objective is to optimize the onboarding process to **increase the conversion rate to registered users by 30%** within the next quarter.

To achieve this, we will focus on the following:

- Work with UXR to perform a usability test of the current state to identify user pain points and usability issues and get user feedback for opportunities for improvement.
- Simplifying the registration process and reducing the number of steps required to sign up.
- Improving the clarity of the onboarding process and providing more information about MB's content and benefits.
- Conduct A/B testing to compare the effectiveness of different onboarding strategies and identify the most effective approach to optimize the onboarding process.

Welcome to the Morning Brew community

Help us cover topics most relevant to you. Tell us a little about your job.

First Name*
Dazzle

Last Name*
Salazar

Job Level*
C-Level

Job Function*
Marketing & Communications

Sub-Job Function*
Select

Organization*

Next

Welcome to the Morning Brew community

Just a few more questions - you are almost done!

Industry*
Technology & Telecommunications

Sub-Industry*
Software

Company Size
50-200

Zip Code
11111

Other publications read at least monthly:
Select

Topics they want to learn more / read more about:
Select

Submit

Onboarding

Usability test

6 Morning Brew NL users, 45 min 1:1 moderated sessions

Gender split. Ranging from 20s-30s yrs old

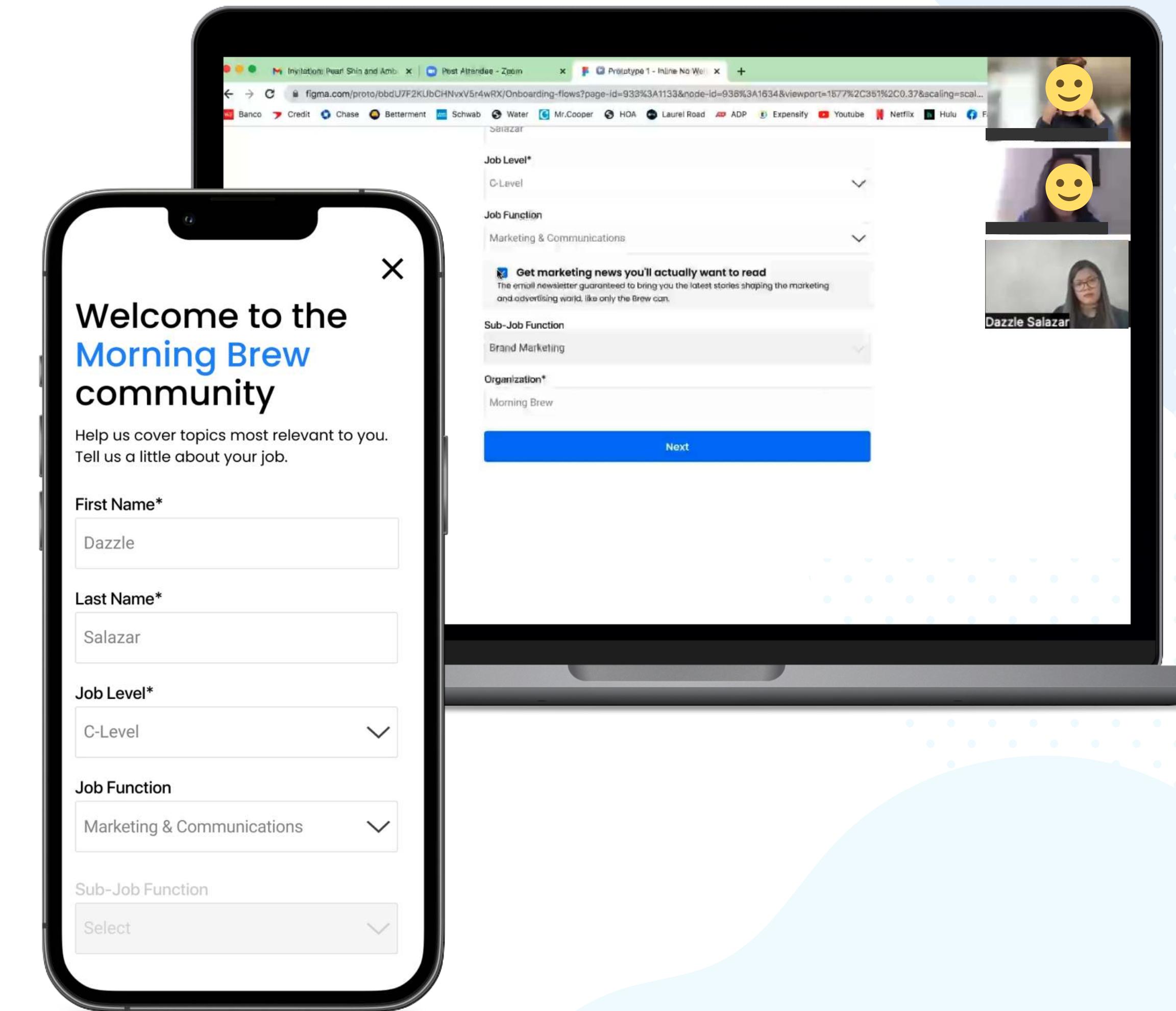
1-5+ years with one or more MB NL's.

Key Questions:

- What detracts users from completing the onboarding flow?
- How long did it take you to complete the sign-up process?
- Do they navigate smoothly from one step to another, or do they get confused and go back and forth?
- Which part do they get stuck in?
- What errors that users encounter during the onboarding flow?
- Are they able to understand the purpose of each step?
- Did you encounter any difficulties during the sign-up process?

User testing goals:

- Evaluate current onboarding flow/experience
- Identify delights, frustrations, areas of confusion
- Identify hurdles
- Identify opportunities for improvement



Onboarding key findings

1

Most users noticed and appreciated the **MB tone** in the current experience. A few mentioned that the form itself could be a tad less bland and more fun witty.

2

Half expected an **open field** for “**other**” for Job or Sub-job function. To add, half chose “other” – they could not find: Project / Program Manager, Sports Broadcasting, Optometrist.

3

Being required to enter their **organization** felt somewhat invasive for a few participants. It’s not clear that they can type “other” (Students) or “I prefer not to respond.”

Welcome to the Morning Brew community

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Dazzle

Last Name*

Salazar

Job Level*

C-Level

Job Function*

Marketing & Communications

Sub-Job Function*

Select

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Next

Welcome to the Morning Brew community

Just a few more questions – you are almost done!

Industry*

Technology & Telecommunications

Sub-Industry*

Software

Company Size

50-200

Zip Code

11111

Other publications read at least monthly:

Select

Topics they want to learn more / read more about:

Select

Submit

Onboarding key findings

1

"Job function" and "Industry" felt **redundant**

2

Participants didn't notice that "**other**" wasn't an option in Sub-Industry

3

Confusion if options were **MB daily or Marketing** focused publications and topics. Options didn't feel relevant.

4

No confirmation after users answer / select

5

On mobile: check boxes might be too small - **fat finger mistakes**

Industry
Other

Sub-Industry*
N/A

Company Size
50-200

Other publications read at least monthly:
Select

- New York Times
- HR Dive
- HR Daily Advisor
- CFO
- None of the above

Job Level*

Mid or Entry Level

Job Function*

IT/Computers/Electronics

Sub-Job Function*

Select

Industry

Computers and Technology

Sub-Industry

Computer Software

Company Size

50-200

Onboarding key findings

User's Responses

As I watched and listened during the session, I wrote some of the quotes that got my attention.

"There's no confirmation after answering questions"

"Job function and industry felt redundant "

"Why do I have to answer so many questions?"

"Why do I need to add Sub-Job function?"

"I can't find where I could type when I select others"

"There's no back button and should save what I wrote"

User's Behavior

Open or not open field? Half expected an open field after click other – it feels more personable

Cumbersome to read through drop down lists on mobile

Many think that the **sign-up processes ask for only basic information** such as name, email address and job etc. But doesn't give any info why they need to those information.

Solutions - The Proposed Design

Based on what they had to say, I've listed some ways to improve user experience and find solutions based on their feedback.

1. Grouping them and making them into multiple pages than one whole list.
2. Adding a progress bar so that users will know how far they have reached the steps.
3. Make the experience more visually appealing by making the selection more interactive and engaging.
4. Consider a typing to dropdown (auto-fill) list experience - less scrolling for mobile users
5. Multi-select chips instead of checkbox to prevent mobile mistakes
6. Saving data after clicking the next button and add a "back" button
7. Make it personalized experience, use the information you gather during the onboarding process to personalize the experience for each user. This could include tailored recommendations and personalized welcome messages like "Hi [Name] Welcome..."
8. Inject some humor or MB tone with emojis and gifs etc.
9. Adding a welcome page with an opportunity to cross-function with other brands.
10. Consider providing more MB vibes in the form and welcome page experience

New Onboarding Experience

The image displays four sequential screenshots of a mobile application's onboarding flow for the "Morning Brew" community. Each screenshot shows a progress bar at the top, a "Next" button at the bottom, and a small emoji icon (clock, question mark, eyes, rocket) next to the "Next" button.

- Screenshot 1:** Welcome screen with a progress bar at 1/5. It asks for First Name and Last Name. A text bubble says: "Hey there :) This will take less than 3 minutes."
- Screenshot 2:** Job-related questions: Job Level*, Job Function*, Sub-Job Function*. A text bubble says: "Hey Dazzle :) To make sure you get the best content tailored to your needs, we'd love to hear a bit more about you".
- Screenshot 3:** Industry-related questions: Industry*, Sub-Industry*, Company Size. A text bubble says: "By selecting your industry, it will help us provide you with relevant and customized content that we can filter and recommend to match your industry topics".
- Screenshot 4:** Summary screen with a progress bar at 5/5. It lists "Other publications read at least monthly:" (artificial intelligence, virtual reality, robotics...) and "Topics they want to learn more / read more about" (The New York Times, NBC News, Entrepreneur...). A text bubble says: "Other publications read at least monthly: artificial intelligence, virtual reality, robotics... Topics they want to learn more / read more about The New York Times, NBC News, Entrepreneur..."

1. A progress bar so that users will know how far they have reached the steps. This sets a user's expectations and decreases the drop-off rate for new users.
2. Giving users a idea of how much time the sign-up process will take with a fun emoji and text bubble or tool tip.
3. Saving data after clicking the next button and add a "back" button.
4. Personalized experience, use the information you gather during the onboarding process to personalize the experience for each user.
5. Giving an explanation of why we need data with tooltip and emoji (MB tone) to explain the importance of providing this information to customize their content topics. This way, they will not think that the content is redundant with their job functions.

New Onboarding Experience

The image consists of four vertical screenshots of a mobile application interface, likely for an onboarding process. Each screenshot shows a header with a logo and search/more options, and a footer with a back arrow, a blue 'Next' button, and a yellow emoji icon.

- Screenshot 1:** Shows the initial state with four dropdown menus: 'Job Level*', 'Job Function*', 'Sub-Job Function*', and 'Organization'. A tooltip at the bottom left says: "Hey Dazzle :) To make sure you get the best content tailored to your needs, we'd love to hear a bit more about you".
- Screenshot 2:** Shows the 'Job Function*' dropdown open, displaying three options: 'Marketing', 'Medical and Health', and 'Media / Entertainment'. A blue numbered callout '6' is positioned above the dropdown. The input field contains the letter 'M'.
- Screenshot 3:** Shows the 'Job Function*' dropdown closed with 'Director / VP' selected. The 'Sub-Job Function*' dropdown is open, showing 'Select' as the option. A red error message bubble says: "7 ! Please choose an option from the dropdown".
- Screenshot 4:** Shows the 'Sub-Job Function*' dropdown closed with 'Other' selected. The input field contains the text 'VP Program Manager'. A blue numbered callout '8' is positioned above the input field.

6. Typing to dropdown (auto-fill) list experience – less scrolling for mobile users

7. Giving error notification if the users did not provide information (for required attribute)

8. Other – Adding input type for “other”

New Onboarding Experience

The image displays four sequential screens from a Morning Brew onboarding flow:

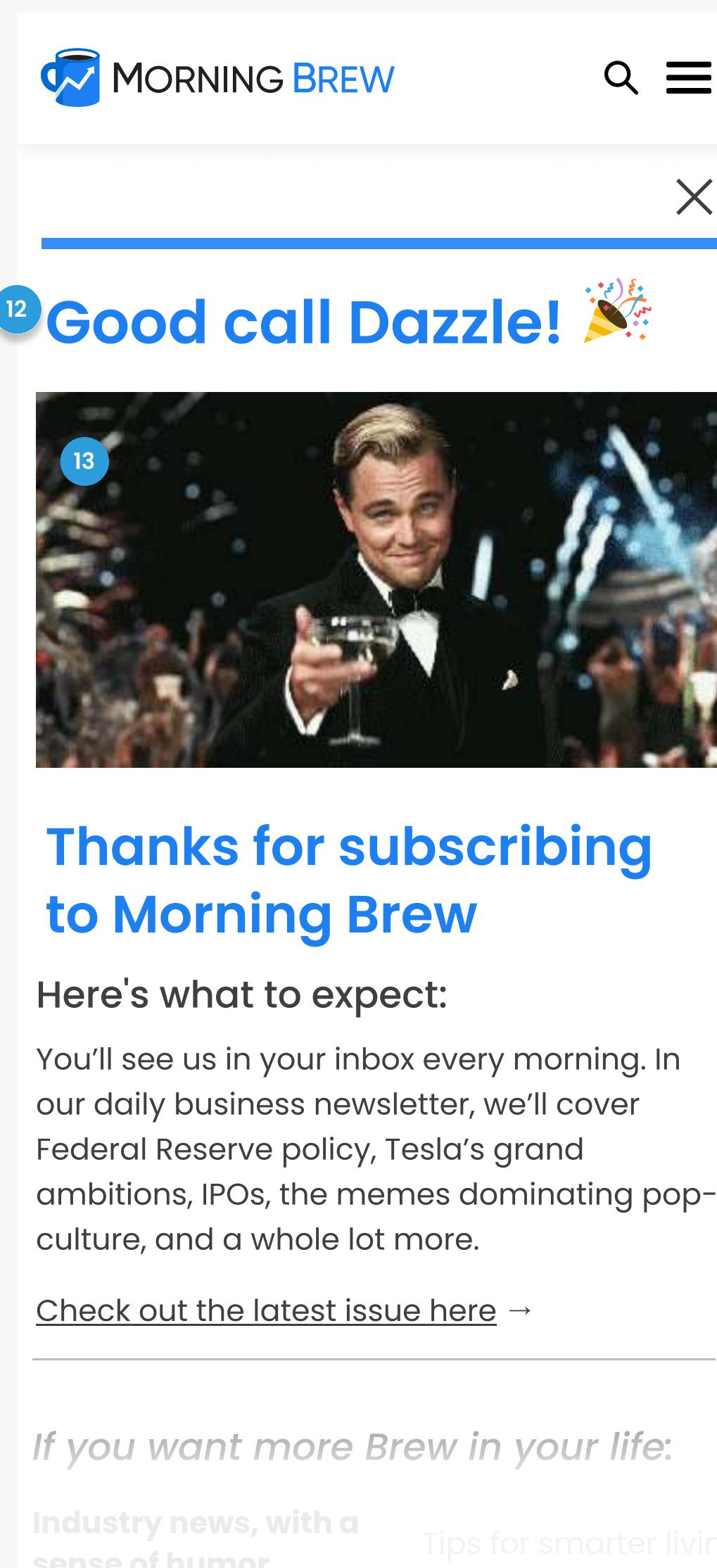
- Step 9:** A multi-select input for "Other publications read at least monthly". It shows a placeholder "Select" and a list of news sources:
 - The New York Times (selected)
 - Bloomberg
 - BBC News
 - NBC News
 - CNBC
 - CNN
 - The Guardian
 - Entrepreneur (selected)
 - Fast Company
 - NBC News
 - Forbes
 - The Atlantic
 - NBC News
 - Forbes
 - Fox News
 - CBS News
 - USA TODAY
 - The Verge
 - VentureBeat
 - Tech CrunchA blue circular badge with the number 9 is positioned to the left of the list.
- Step 10:** A note "None - I don't read any of these" with a yellow emoji of a face with large eyes.
- Step 11:** A multi-select input for "Topics they want to learn more / read more about". It shows a placeholder "Select" and a list of topics:
 - artificial intelligence (selected)
 - cryptocurrency
 - world news
 - virtual reality (selected)
 - innovation
 - stock markets
 - robotics (selected)
 - health care technology
 - internet of things
 - computer science
 - politics
 - startups
 - innovation
 - personal finance
 - internal revenue service
 - investingA blue circular badge with the number 11 is positioned to the left of the list.

9. Pill UI – for Multi select instead of checkbox

10. Option to skip or not to answer it

11. Answers were displayed on the input

New Welcome page



12 Good call Dazzle! 🎉

13 

14 Thanks for subscribing to Morning Brew

15 Here's what to expect:

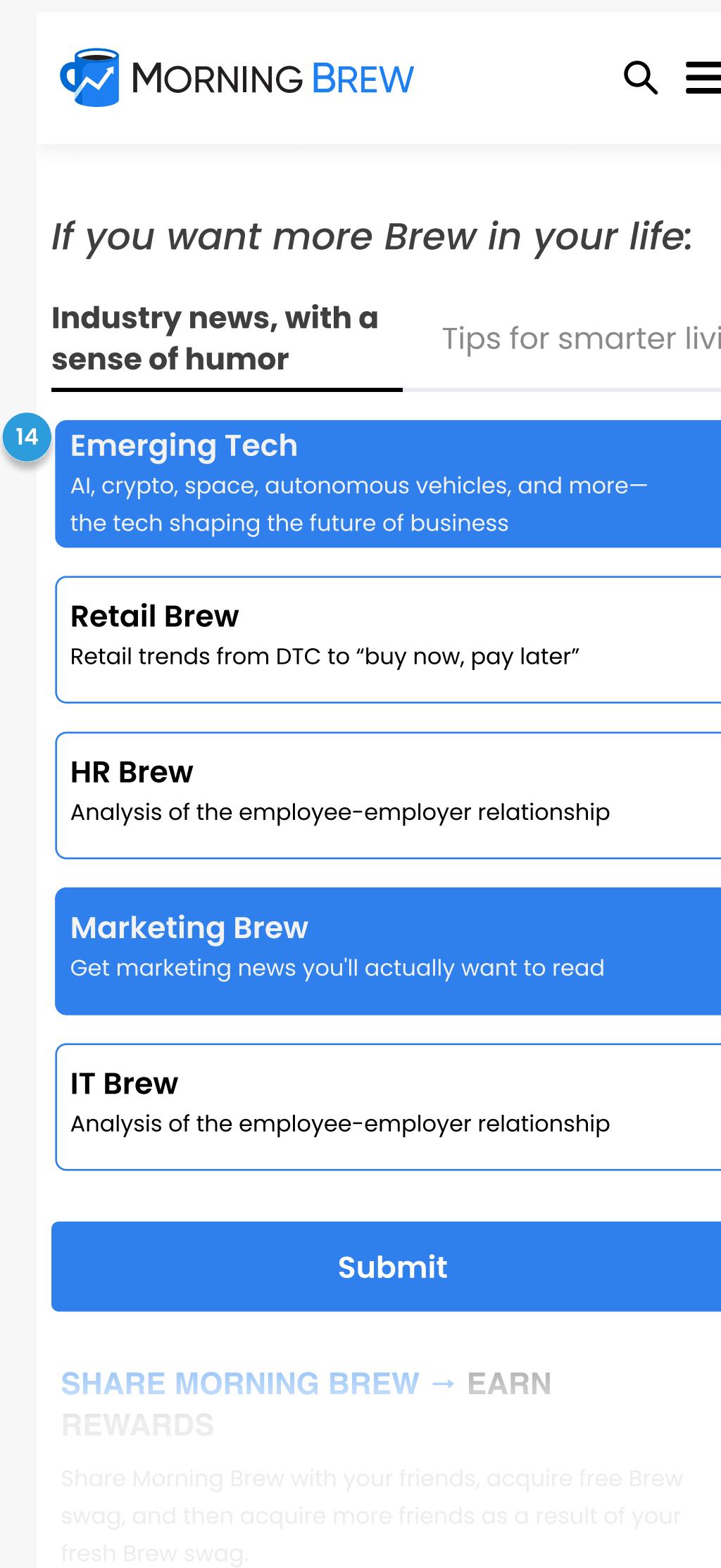
You'll see us in your inbox every morning. In our daily business newsletter, we'll cover Federal Reserve policy, Tesla's grand ambitions, IPOs, the memes dominating pop-culture, and a whole lot more.

[Check out the latest issue here →](#)

If you want more Brew in your life:

Industry news, with a sense of humor

Tips for smarter living



If you want more Brew in your life:

Industry news, with a sense of humor

Tips for smarter living

14 Emerging Tech
AI, crypto, space, autonomous vehicles, and more—the tech shaping the future of business

Retail Brew
Retail trends from DTC to "buy now, pay later"

HR Brew
Analysis of the employee-employer relationship

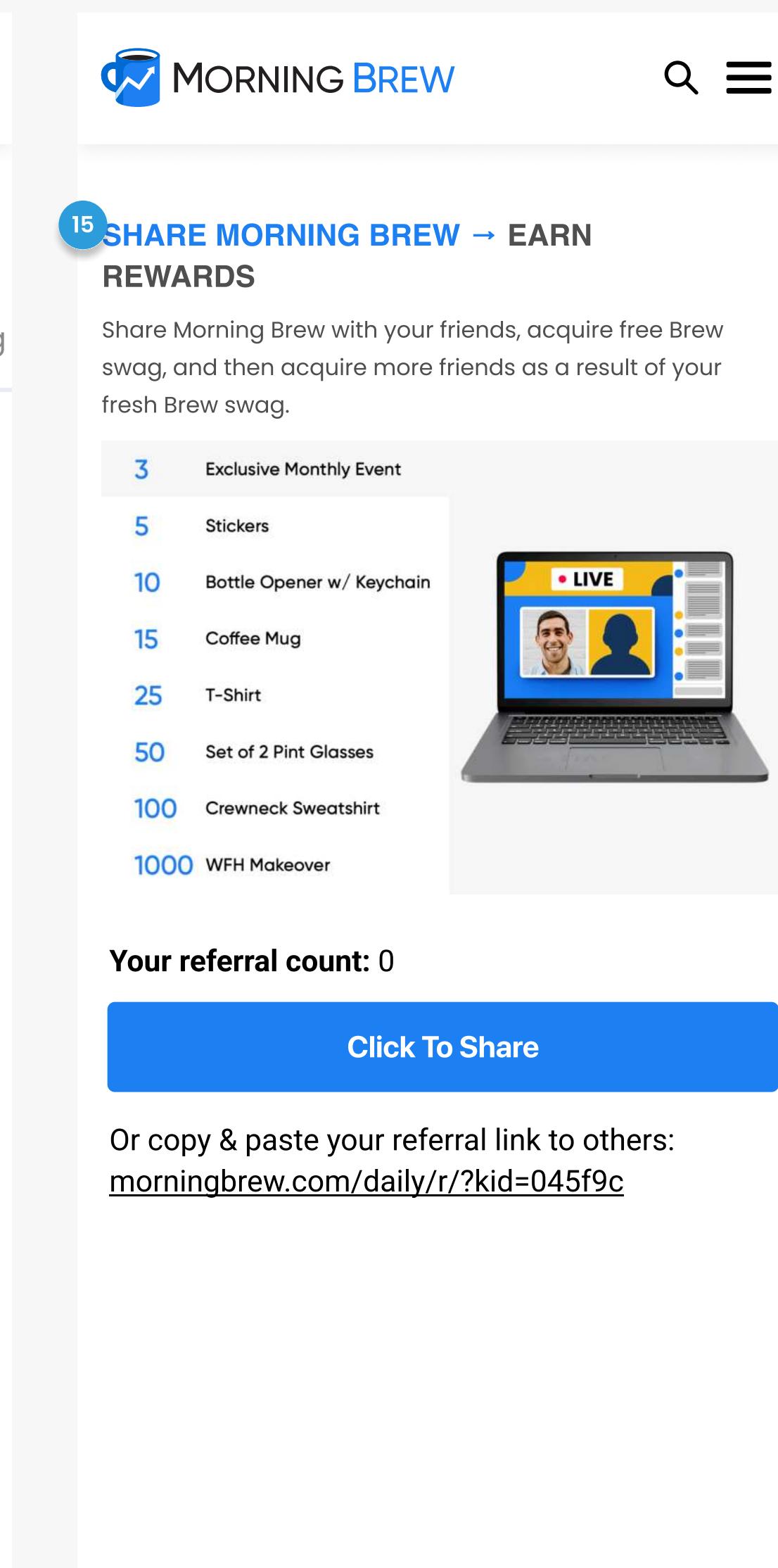
Marketing Brew
Get marketing news you'll actually want to read

IT Brew
Analysis of the employee-employer relationship

Submit

15 SHARE MORNING BREW → EARN REWARDS

Share Morning Brew with your friends, acquire free Brew swag, and then acquire more friends as a result of your fresh Brew swag.



15 SHARE MORNING BREW → EARN REWARDS

Share Morning Brew with your friends, acquire free Brew swag, and then acquire more friends as a result of your fresh Brew swag.

3 Exclusive Monthly Event

5 Stickers

10 Bottle Opener w/ Keychain

15 Coffee Mug

25 T-Shirt

50 Set of 2 Pint Glasses

100 Crewneck Sweatshirt

1000 WFH Makeover

LIVE 

Your referral count: 0

Click To Share

Or copy & paste your referral link to others:
morningbrew.com/daily/r/?kid=045f9c

12. Personalized experience, use the information you gather during the onboarding process to personalize the experience for each user.
13. Welcome page with an opportunity to cross-function with other brands.
14. Earn Rewards added on welcome page

Results on New Features

Impact

Post launch, we started tracking the data 30 days after the release and continued to track ongoing. The biggest impact test seems to be the grouping onboarding in which the variant had over a 75% conversion rate for Mobile Users. This beat the original display (40% conversion) by 25%.

Before

Users that leave the page immediately

15%

Users that register

40%

Users that make it to the welcome screen

45%

After

Users that leave the page immediately

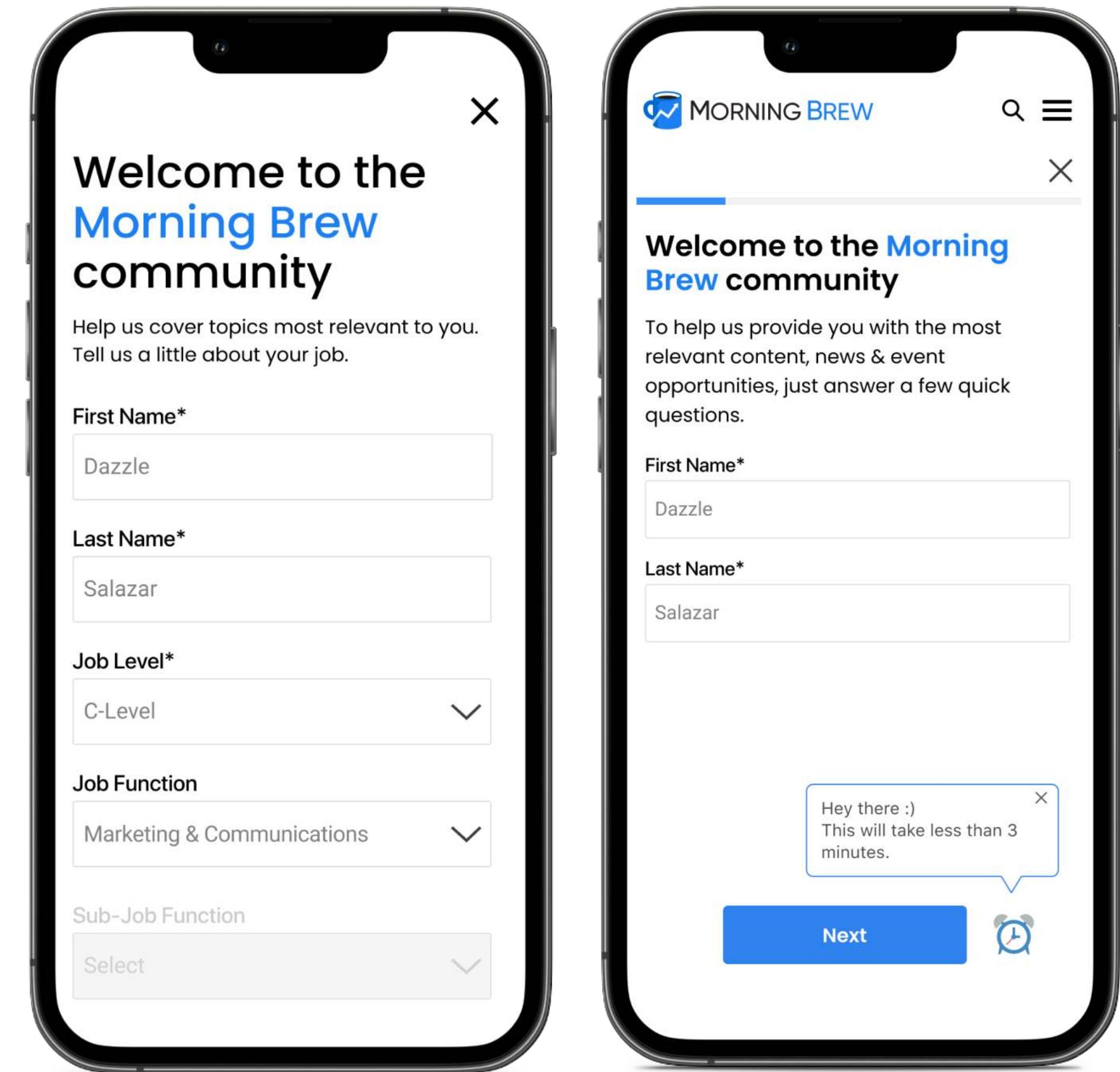
11%

Users that register

75%

Users that make it to the welcome screen

80%



Coming soon and more experiments:

- Welcome page testing
- Rethink Welcome page blurb content.
- Explore ways to give a (reward?) confirmation that users completed a question.
- Reconsider the amount and/or grouping of questions to make the form feel shorter. i.e. Job Function and Industry can be grouped or slimmed down and test.

Thank you!

Questions?

