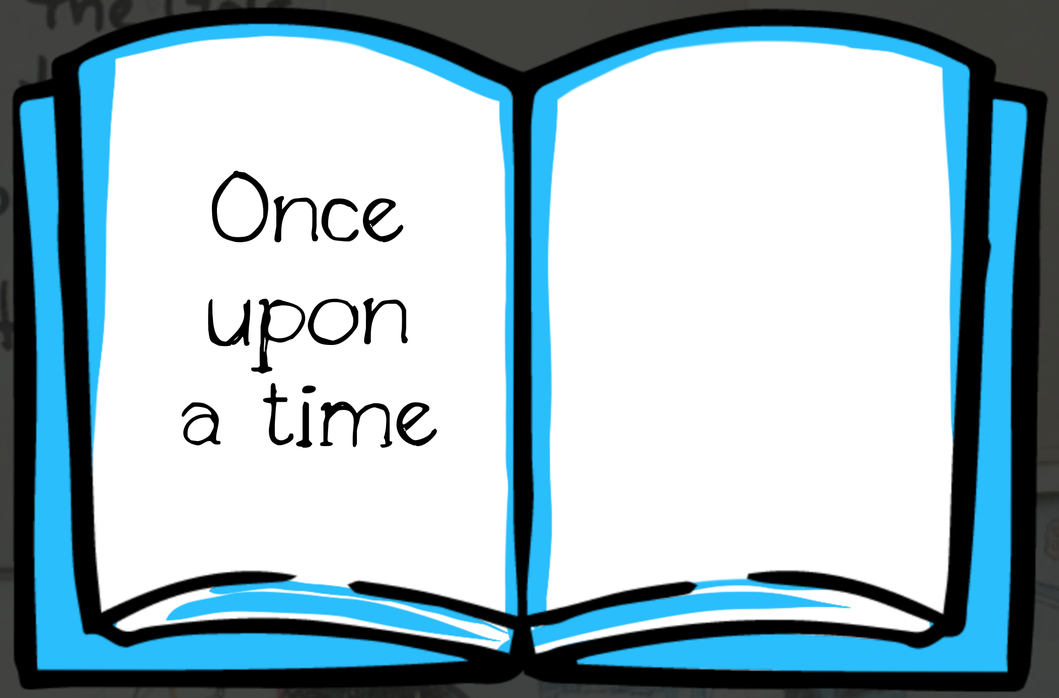
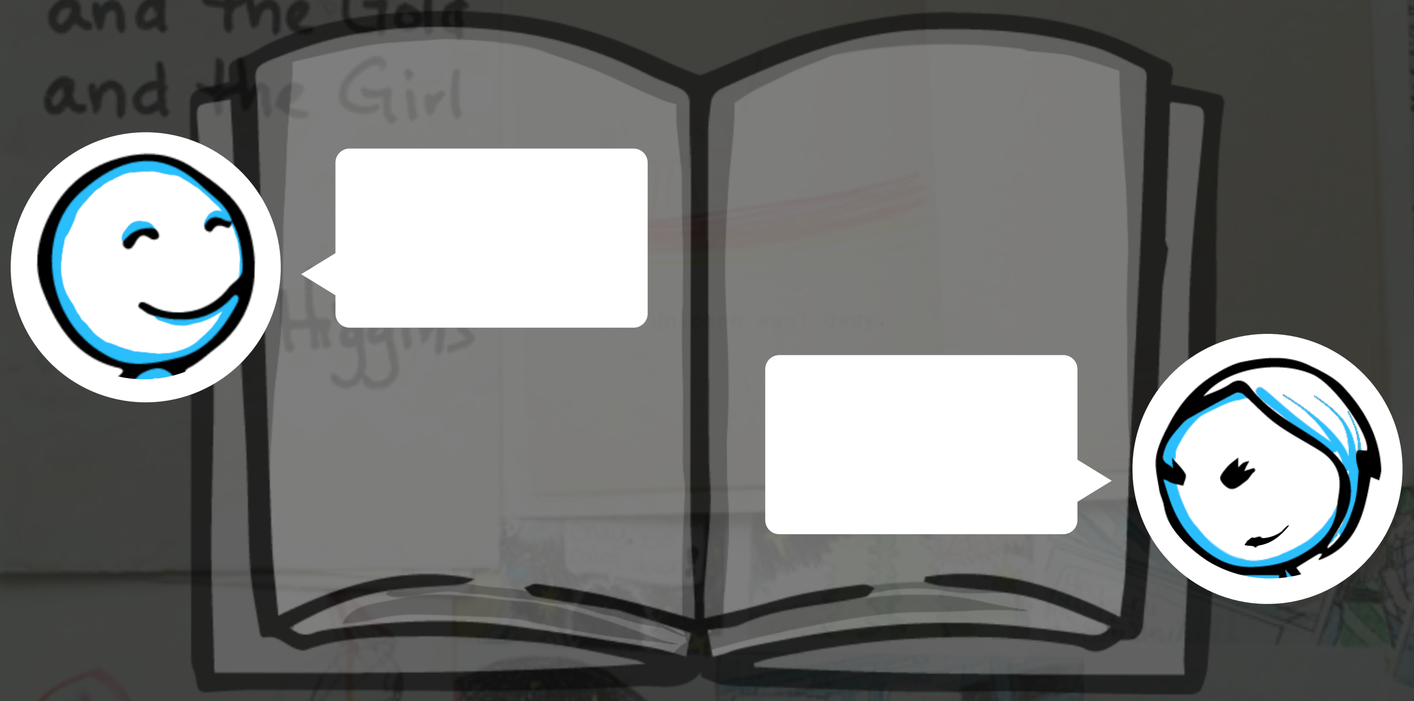
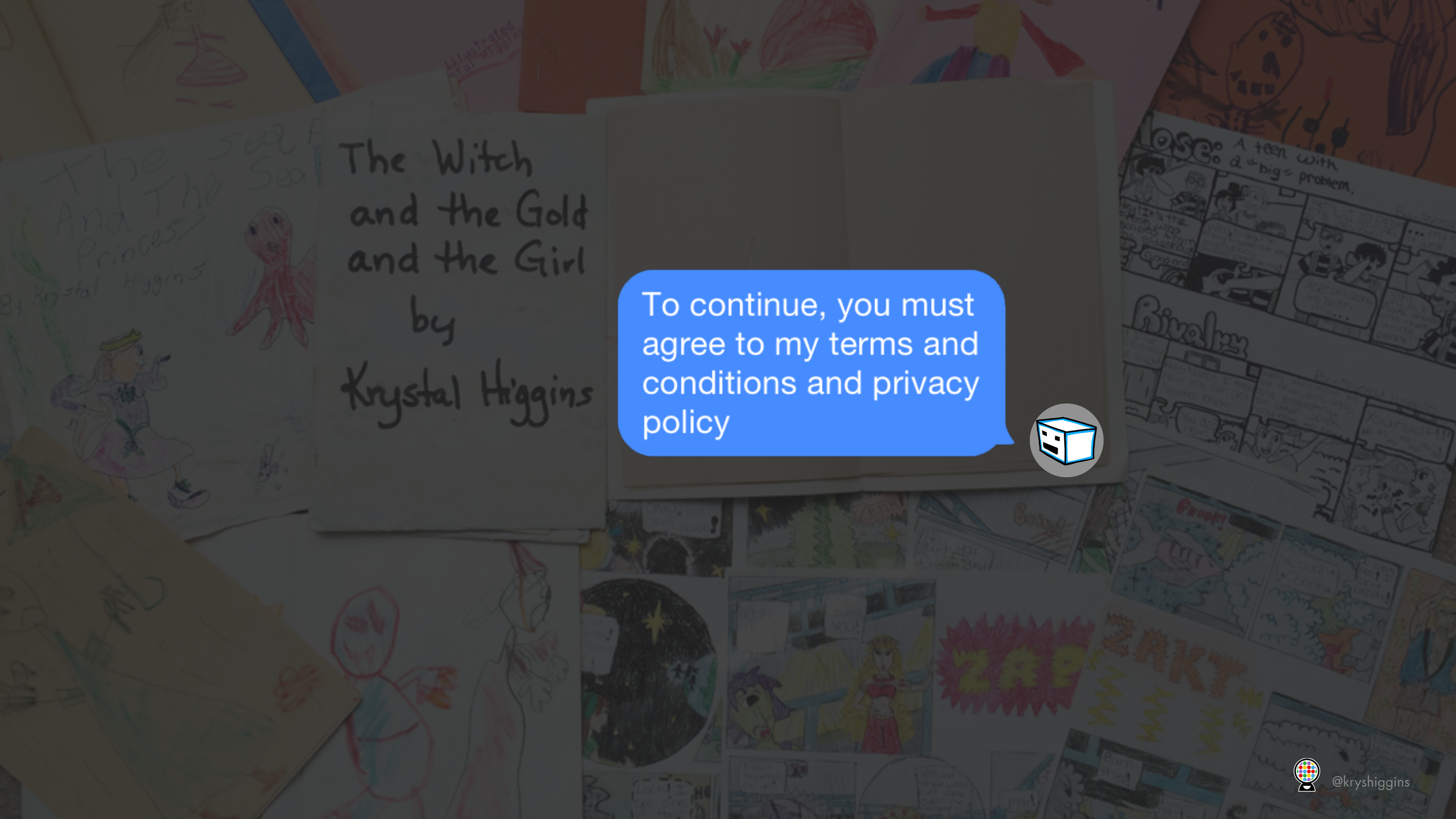
# New users matter too!

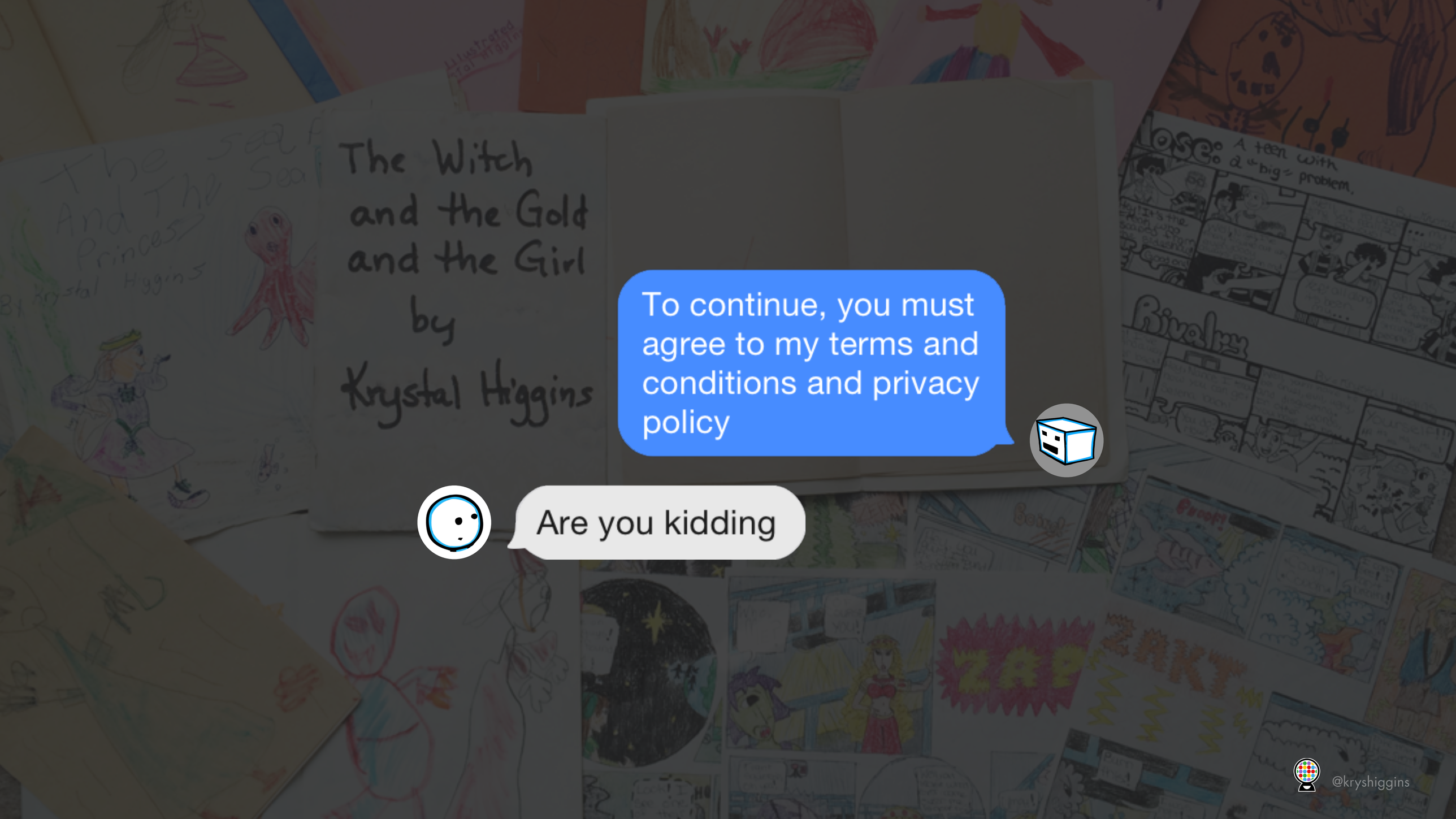
## Designing better onboarding

KRYSTAL HIGGINS
@kryshiggins #firsttimeux


Once
upon
a time

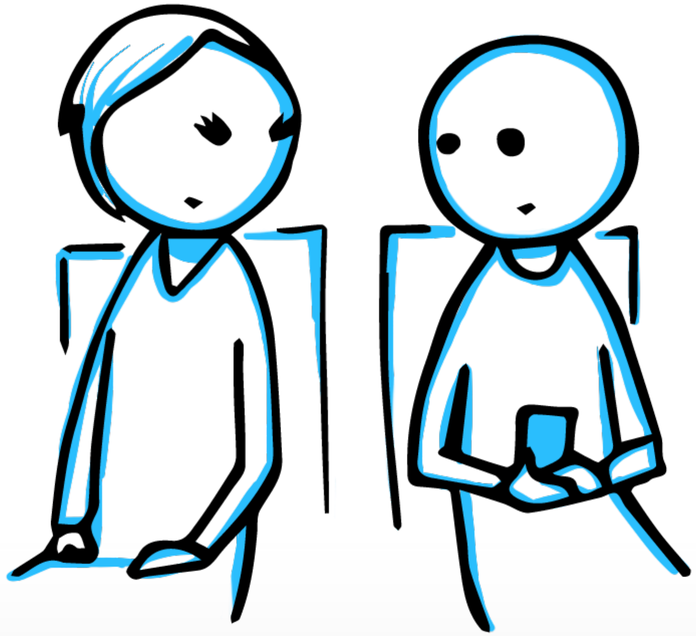



The Witch
and the Gold
and the Girl
by
Krystal Higgins
To continue, you must agree to my terms and conditions and privacy policy
@kryshiggins


The Witch
and the Gold
and the Girl
by
Krystal Higgins
To continue, you must agree to my terms and conditions and privacy policy
Are you kidding
@kryshiggins

# What's the first thing your site says, or does, to greet a new user?

# Now, greet your seat neighbor that way!



**Sign up.**

**Subscribe.**

**Agree.**

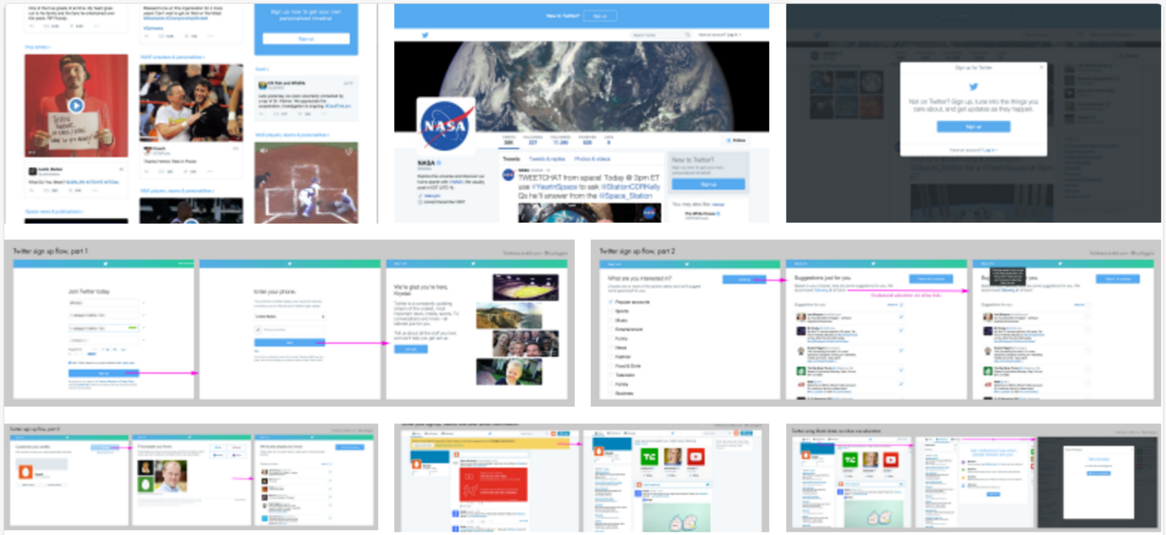
Mission critical virality leverage platform cross-device B2C. Brand awareness Gen Y responsive SEO. Tablet thought leadership scalability. Holistic council engagement. Granular synergies hit the like button

**...?**

# First Time User Experiences

I'm Krystal Higgins and this is my collection of new user experiences, good and bad, from a variety of products. Learn more about designing good onboarding experiences.

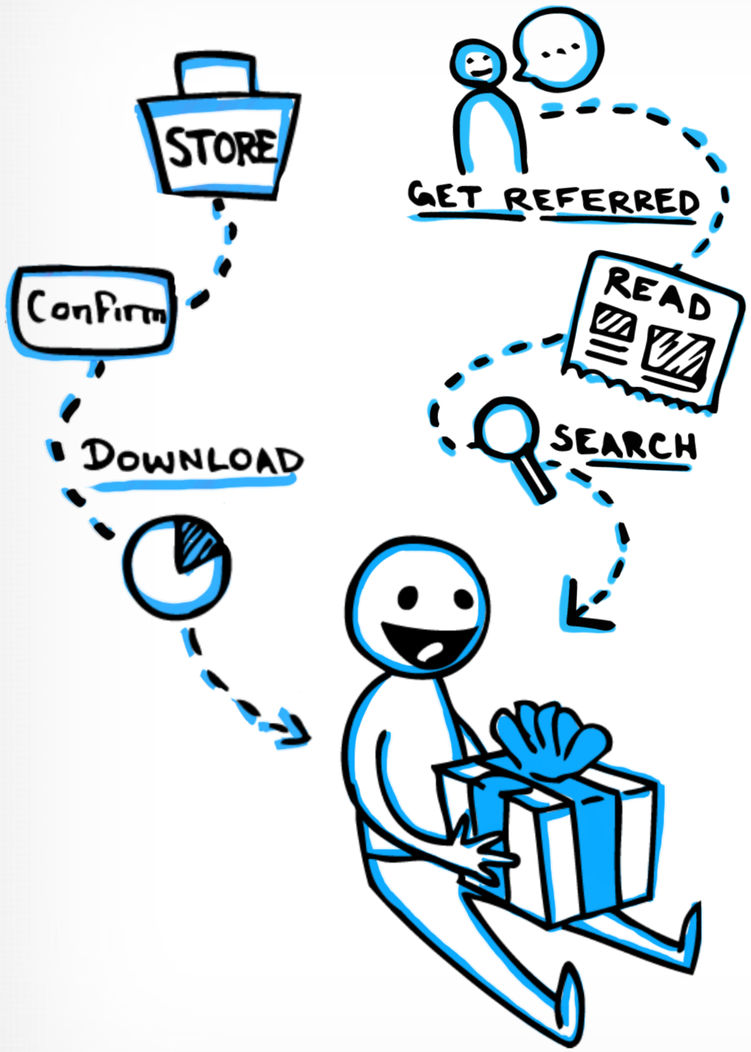
MOBILE WEB TABLET IOT FITNESS ABOUT ARCHIVE

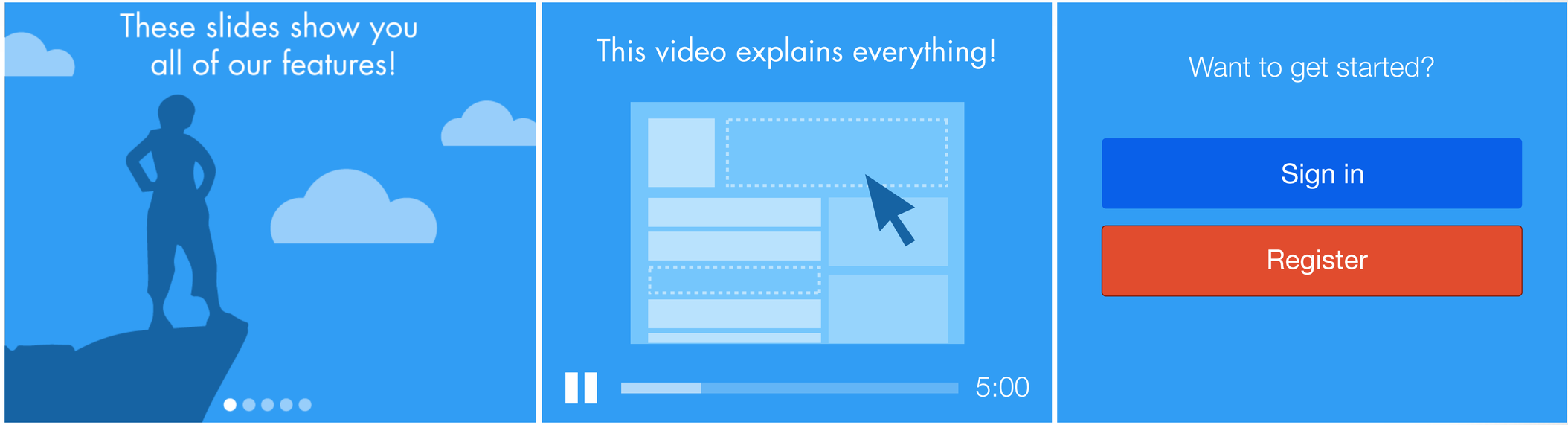


**Twitter.com (desktop) first time user experience**

**The good bits**

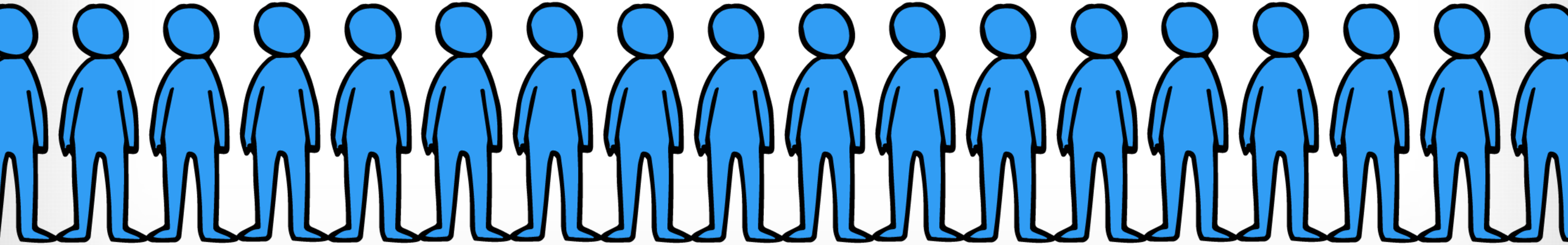
@kryshiggins


STORE
GET REFERRED
ConFirm
READ
DOWNLOAD
SEARCH

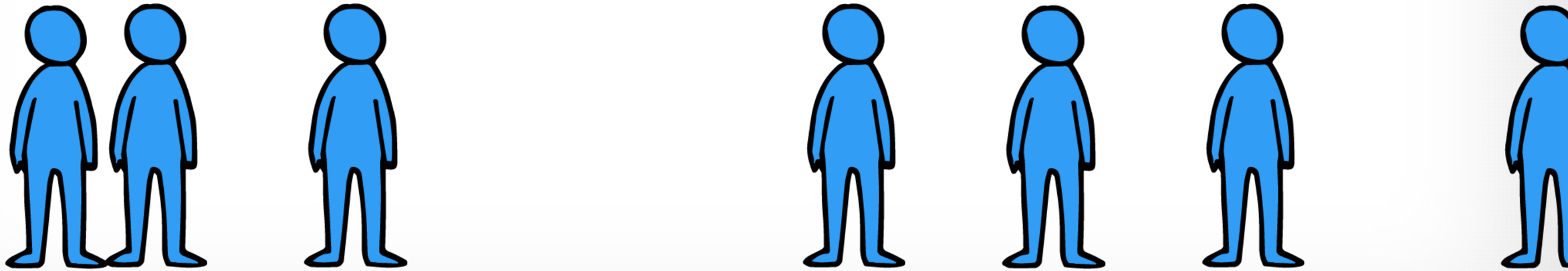


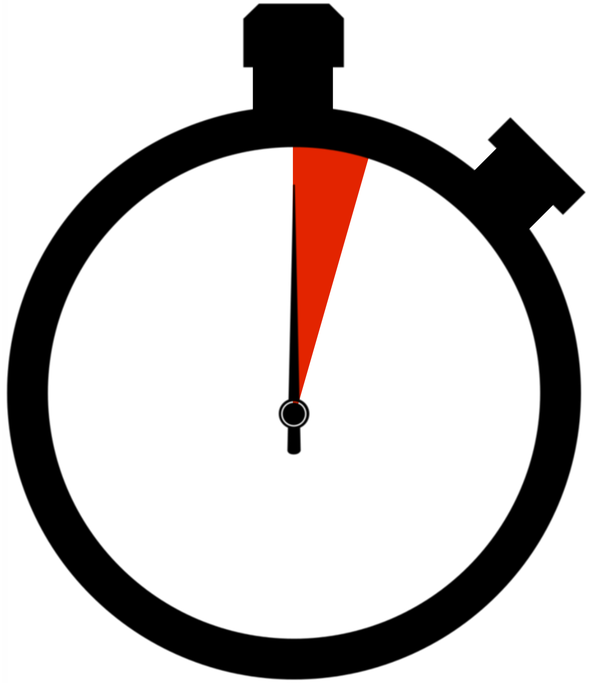
@kryshiggins

# We fight to get new users

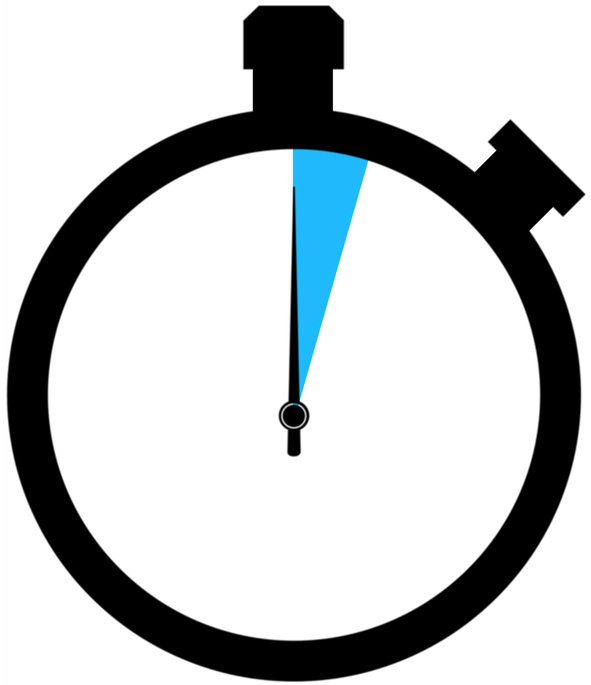


# We fight to get new users but struggle to retain them





# We have a limited opportunity



# Let's not waste it!

# Onboarding

Retention

Engagement

By Ocastro (Own work) [CC BY-SA 3.0 (http://creativecommons.org/licenses/by-sa/3.0)], via Wikimedia Commons

# Onboard new users with:

1. Guided interaction
2. Free samples
3. Personal focus

# Onboard new users with:

1. **Guided interaction**
2. Free samples
3. Personal focus

PRESSURE GROUP AT END OF SURFACE INTERVAL

| DEPTH (feet) ▼ | Z | Y | X | W | V | U | T | S | R | Q | P | O | N | M | L | K | J | I | H | G | F | E | D | C | B | A |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 35 | 205 | 188 | 168 | 152 | 139 | 127 | 117 | 108 | 100 | 92 | 85 | 79 | 73 | 67 | 62 | 57 | 52 | 48 | 44 | 40 | 36 | 32 | 29 | 25 | 19 | 10 |
| | | 17 | 37 | 53 | 66 | 78 | 88 | 97 | 105 | 113 | 120 | 126 | 132 | 138 | 143 | 148 | 153 | 157 | 161 | 165 | 169 | 173 | 176 | 180 | 186 | 195 |
| 40 | 140 | 129 | 120 | 111 | 104 | 97 | 91 | 85 | 79 | 74 | 69 | 64 | 60 | 55 | 51 | 48 | 44 | 40 | 37 | 34 | 31 | 27 | 25 | 22 | 16 | 9 |
| | | 11 | 20 | 29 | 36 | 43 | 49 | 55 | 61 | 66 | 71 | 76 | 80 | 85 | 89 | 92 | 96 | 100 | 103 | 106 | 109 | 113 | 115 | 118 | 124 | 131 |
| 50 | | | 80 | 75 | 71 | 67 | 63 | 60 | 57 | 53 | 50 | 47 | 44 | 41 | 38 | 36 | 33 | 31 | 28 | 26 | 24 | 21 | 19 | 17 | 13 | 7 |
| | | | | 5 | 9 | 13 | 17 | 20 | 23 | 27 | 30 | 33 | 36 | 39 | 42 | 44 | 47 | 49 | 52 | 54 | 56 | 59 | 61 | 63 | 67 | 73 |
| 60 | | | | 55 | 54 | 52 | 49 | 47 | 44 | 42 | 39 | 37 | 35 | 33 | 31 | 29 | 27 | 25 | 23 | 21 | 19 | 17 | 16 | 14 | 11 | 6 |
| | | | | | 1 | 3 | 6 | 8 | 11 | 13 | 16 | 18 | 20 | 22 | 24 | 26 | 28 | 30 | 32 | 34 | 36 | 38 | 39 | 41 | 44 | 49 |
| 70 | | | | | | | 40 | 38 | 36 | 34 | 33 | 31 | 29 | 27 | 26 | 24 | 22 | 21 | 19 | 18 | 16 | 15 | 13 | 12 | 9 | 5 |
| | | | | | | | | 2 | 4 | 6 | 7 | 9 | 11 | 13 | 14 | 16 | 18 | 19 | 21 | 22 | 24 | 25 | 27 | 28 | 31 | 35 |
| 80 | | | | | | | | | 30 | 29 | 28 | 26 | 25 | 23 | 22 | 21 | 19 | 18 | 17 | 15 | 14 | 13 | 11 | 10 | 8 | 4 |
| | | | | | | | | | | | 2 | 4 | 5 | 7 | 8 | 9 | 11 | 12 | 13 | 15 | 16 | 17 | 19 | 20 | 22 | 26 |
| 90 | | | | | | | | | | 25 | 24 | 23 | 22 | 21 | 19 | 18 | 17 | 16 | 15 | 13 | 12 | 11 | 10 | 9 | 7 | 4 |
| | | | | | | | | | | | | 2 | 3 | 4 | 6 | 7 | 8 | 9 | 10 | 12 | 13 | 14 | 15 | 16 | 18 | 21 |
| 100 | | | | | | | | | | | | 20 | 19 | 18 | 17 | 16 | 15 | 14 | 13 | 12 | 11 | 10 | 9 | 8 | 6 | 3 |
| | | | | | | | | | | | | | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 14 | 17 |
| 110 | | | | | | | | | | | | | | 16 | 15 | 14 | 14 | 13 | 12 | 11 | 10 | 9 | 8 | 7 | 6 | 3 |
| | | | | | | | | | | | | | | | | 2 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 13 |
| 120 | | | | | | | | | | | | | | | | 13 | 12 | 12 | 11 | 10 | 9 | 8 | 7 | 6 | 5 | 3 |
| | | | | | | | | | | | | | | | | | | | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 10 |
| 130 | | | | | | | | | | | | | | | | | | | 10 | 9 | 8 | 8 | 7 | 6 | 5 | 3 |
| | | | | | | | | | | | | | | | | | | | | | | | 3 | 4 | 5 | 7 |

IMPERIAL

RETURN TO TABLE ONE

© Diving Science & Technology, Corp. 1985-2005 Printed in USA.

## TABLE 3 • REPETITIVE DIVE TIMETABLE

The Recreational Dive Planner is designed specifically for planning recreational (no decompression) dives on air only. Do not attempt to use it for planning decompression dives.

*Safety Stops* — A safety stop for 3 minutes at 15ft is required any time the diver comes up to or within 3 pressure groups of a no decompression limit and for any dive to a depth of 100ft or deeper.

*Emergency Decompression* — If a no decompression limit is exceeded by no more than 5 minutes, an 8 minute decompression stop at 15ft is mandatory. Upon surfacing, the diver must remain out of the water for at least 6 hours prior to making another dive. If a no decompression limit is exceeded by more than 5 minutes, a 15ft decompression stop of no less than 15 minutes is urged (air supply permitting). Upon surfacing, the diver must remain out of the water for at least 24 hours prior to making another dive.

*Flying After Diving Recommendations*

**For Dives Within the No Decompression Limits**

- Single Dives: A minimum pre-flight surface interval of 12 hours is suggested.
- Repetitive Dives and/or Multi-day Dives: A minimum pre-flight surface interval of 18 hours is suggested.

**For Dives Requiring Decompression Stops**

- A minimum pre-flight surface interval greater than 18 hours is suggested.

*Diving at Altitude* — Diving at altitude (1000ft or higher) requires the use of special procedures.

*Special Rules for Multiple Dives*

If you are planning 3 or more dives in a day: Beginning with the first dive, if your ending pressure group after any dive is W or X, the minimum surface interval between all subsequent dives is 1 hour. If your ending pressure group after any dive is Y or Z, the minimum surface interval between all subsequent dives is 3 hours.

*Note: Since little is presently known about the physiological effects of multiple dives over multiple days, divers are wise to make fewer dives and limit their exposure toward the end of a multi-day dive series.*

*General Rules*

- Ascend from all dives at a rate not to exceed 60ft per minute.
- When planning a dive in cold water or under conditions that might be strenuous, plan the dive assuming the depth is 10ft deeper than actual.
- Plan repetitive dives so each successive dive is to a shallower depth. Limit repetitive dives to 100ft or shallower.
- Never exceed the limits of this planner and, whenever possible, avoid diving to the limits of the planner. 140ft is for emergency purposes only, do not dive to this depth.

25
30

White area indicates *Residual Nitrogen Time* (RNT) in minutes and is to be added to Actual Bottom Time (ABT).

Blue area indicates adjusted no decompression limits. *Actual Bottom Time* (ABT) should not exceed this number.

Residual Nitrogen Time (RNT)
\+ Actual Bottom Time (ABT)
= Total Bottom Time (TBT)

**CAUTION: This product for use only by certified divers or individuals under the supervision of a certified scuba instructor. Misuse of this product may result in serious injury or death. If you are unsure as to how to properly use this product, consult a certified scuba instructor.**

Product No. 66054 Ver 1.2 (Rev. 02/03) 012PDK5

Too restrictive

Too restrictive

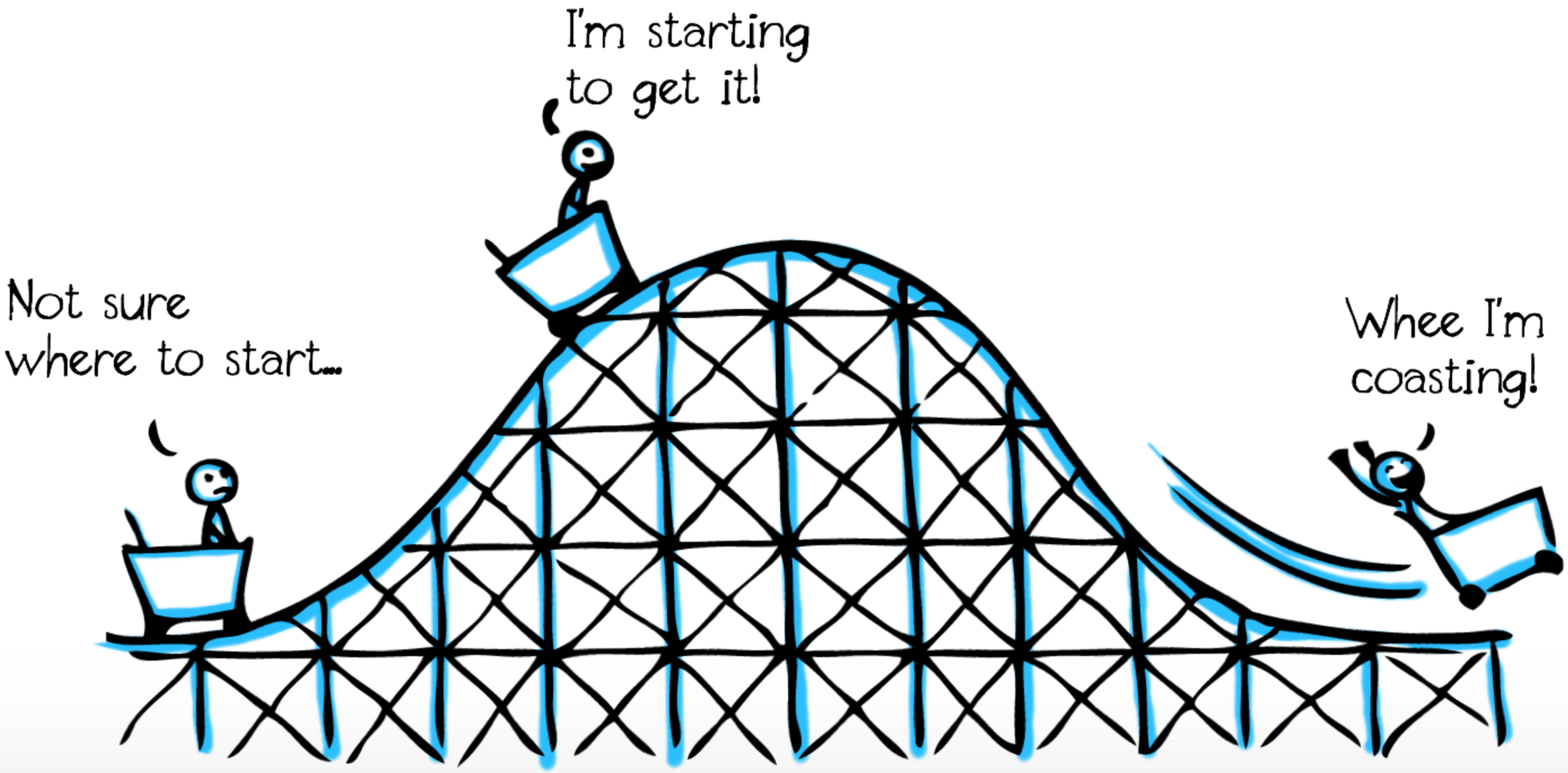
Too helpless

Too restrictive

**Just right**

Too helpless

# Scaffolded instruction

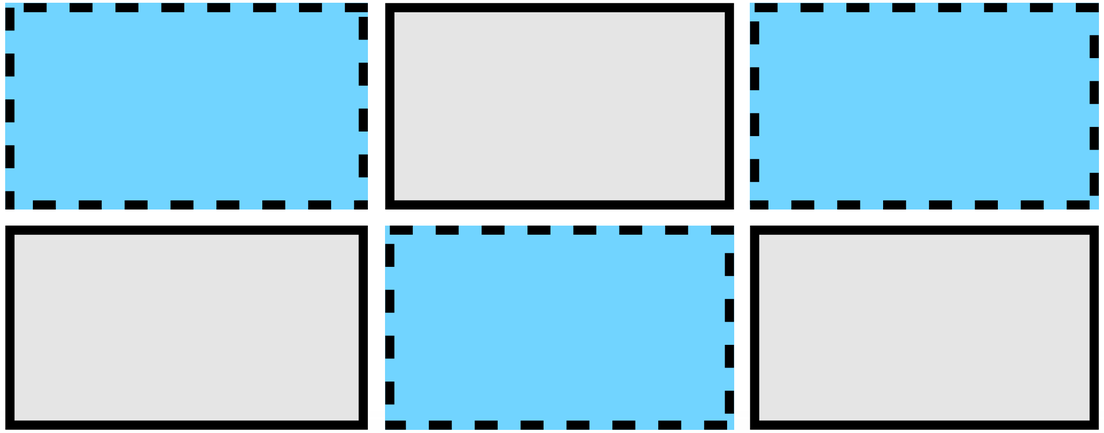


# Good guidance:

- Facilitates exploration in an **authentic space**
- **Gradually** engages
- Provides **actionable** next steps

# Pattern: Inline cues

Guidance embedded within surrounding content



Medium

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With U.S. commercial electricity prices at their highest point in nearly a decade, many businesses are looking to solar to meaningfully increase their bottom line and drive incremental enterprise value.

Read more 4 min

221 14

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Fiction | Dreams

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   Steven Levy
2. Firearms are no longer a hobby of mine
   Michael Pusateri
3. Side Product Marketing is The New King
   Ali Mese

4 days ago

## Putting Away the Books to Learn

The "maker" movement has swept across schools in California and beyond. Can it fundamentally change K-12 education?

Screenshot © 2016 Medium Inc, used with permission

Guided interaction

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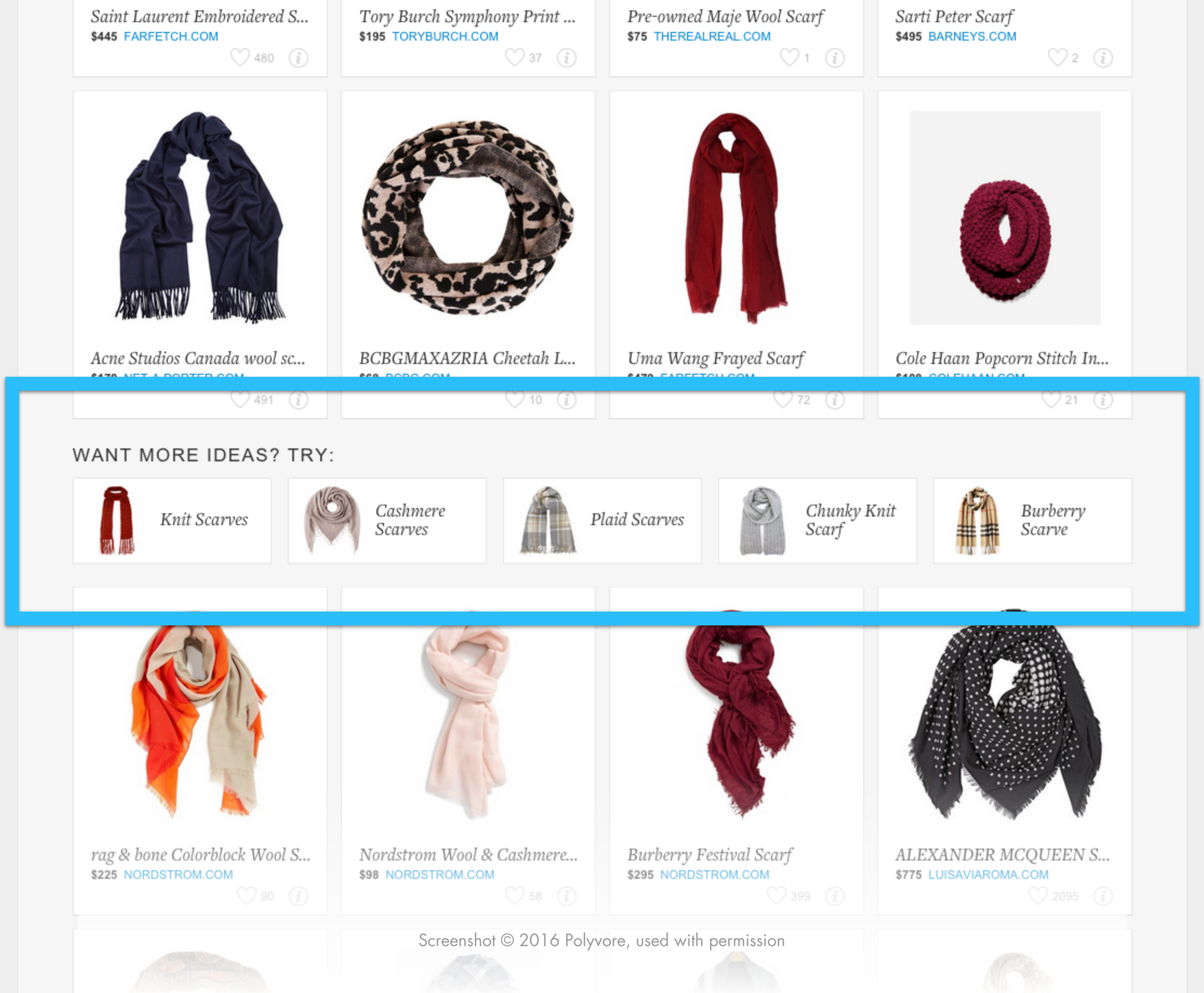


Guided interaction

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@kryshiggins

Google

Search Google Keep

Krystal

Notes

All notes saved

Add note

**Welcome to Google Keep**

Capture what's on your mind.

Add notes, lists, photos and audio to Keep.

**Everything in one place**

Any way you access Keep, all your notes stay in sync.

On the web
https://keep.google.com

On Android
https://g.co/keep

In Chrome
https://g.co/keepinchrome

**Make a list**

- [ ] To rearrange your list, drag and drop items
- [ ] Check things off when you're done
- [x] ~~Checked items automatically move to the bottom of the list and...~~

Done with a note? Use the archive button or swipe it away on Android.

Give it a try! You can always search for it later.

Guided interaction

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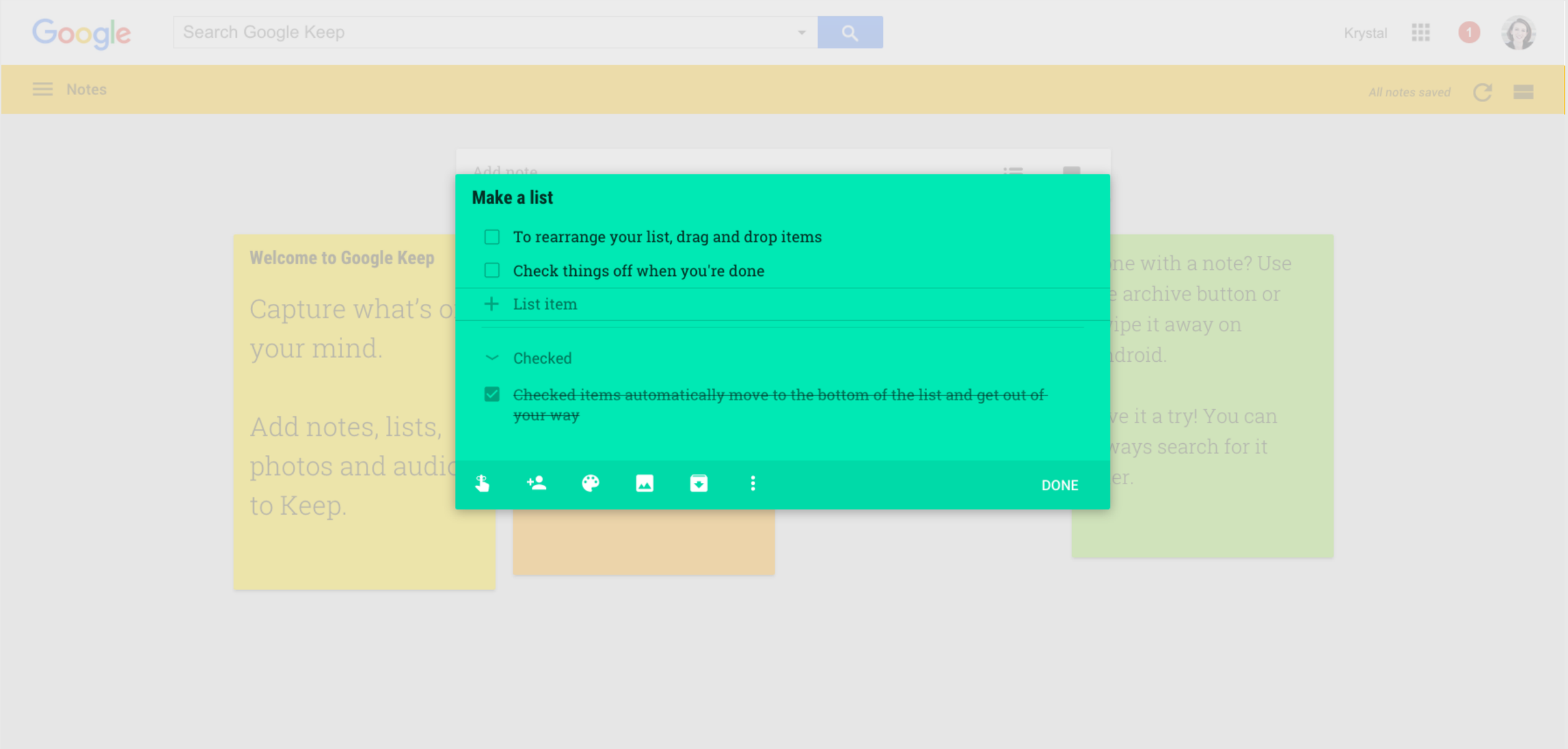
@kryshiggins

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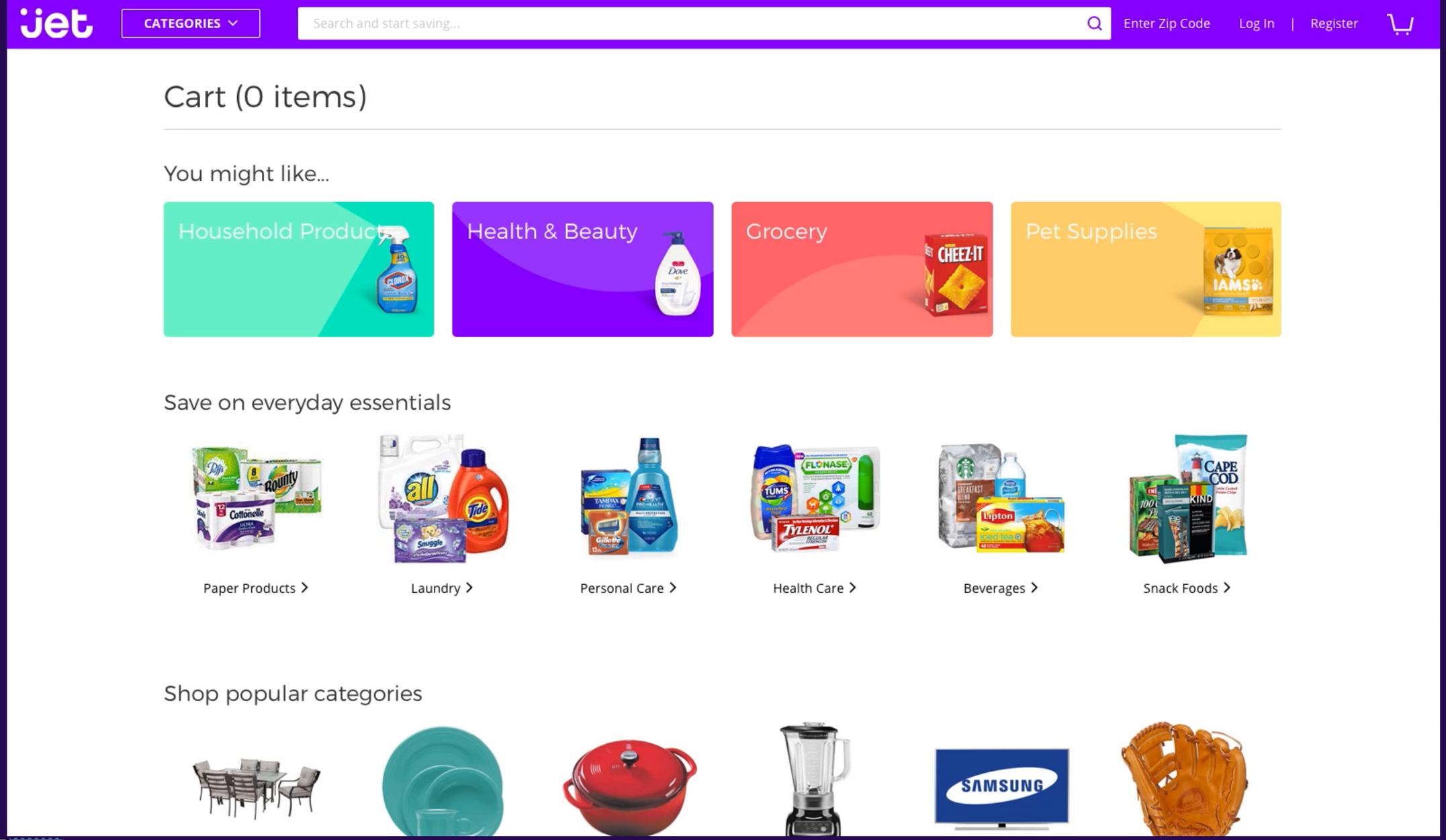


Guided interaction

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@kryshiggins

jet CATEGORIES Search and start saving... Enter Zip Code | Log In | Register

Filter by: Categories | Brands | Prices | Pet Food Type | Pet Treat Type | Dietary Needs | See All Filters | Sort by: Relevance

Kirkland Signature
Kirkland Signature Nature's Domain Salmon Meal & Sweet Potato Dry Dog Food...
$37.39
$36.98 with extra savings
2 Day Delivery
Add to Cart

Temptations
Temptations MixUps Cat Treats, Backyard Cookout, 12 Oz
$5.59
$5.52 with extra savings
2 Day Delivery
Add to Cart

Seresto
Seresto™ Flea & Tick Collar Large Dogs
$84.99
$38.49
$38.07 with extra savings
2 Day Delivery
Add to Cart

Himalayan Dog Chew
Himalayan All Natural Authentic Grain Free Dog Chew Treat Large Red Bag...
$11.99
$8.05
$7.96 with extra savings
1 in cart
2 Day Delivery
- 1 +

CET
CET Chews Dog Large, 30 count
$12.59
$12.45 with extra savings
2 Day Delivery

Fresh Step
Fresh Step Regular Extreme Cat Litter, 14 lb
$9.99
$6.24
$6.17 with extra savings
2 Day Delivery

Taste of the Wild
Taste of the Wild Pacific Stream Canine Formula Grain-Free Smoked Salmon...
$43.99
Log in or register to see pricing details
2 Day Delivery

Temptations
Temptations Ocean Middles Cat Treats, Salmon & Tuna, 2.47 Oz
$1.98
$1.96 with extra savings
2 Day Delivery

$26.95 away from FREE shipping

1 $8.05

$4.34 $7.48 $6.87

Watch prices **DROP** as you shop!

Subtotal
$8.05
View Cart

Guided interaction

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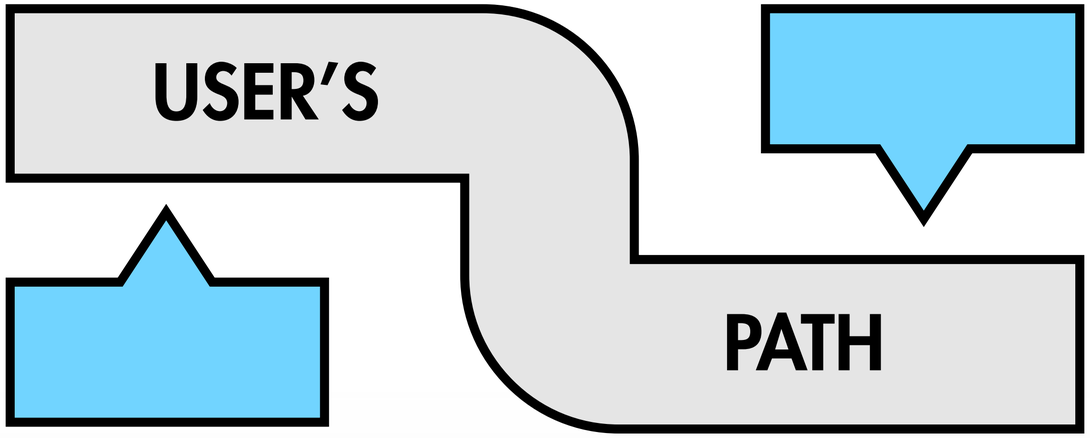
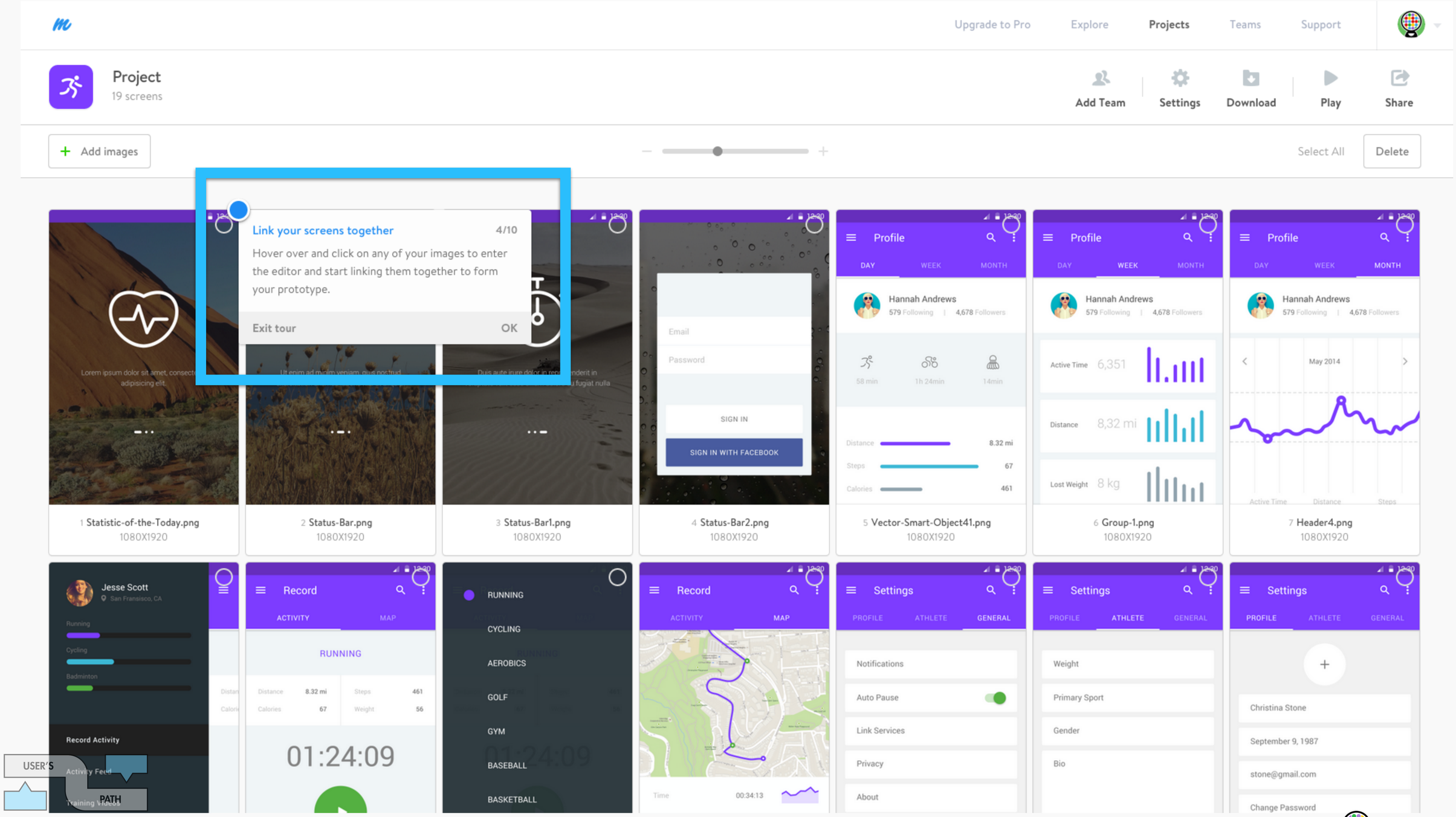
@kryshiggins

# Pattern: User-guided tutorial

Temporary guidance
triggered by user exploration



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@kryshiggins

Status-Bar.png 2/19 Replace Timer Preview Done

Keyboard shortcuts: ← and → to navigate, ESC to close, - and + to zoom, A to annotate.

50%

Fixed Header

0 px

USER'S PATH

Guided interaction

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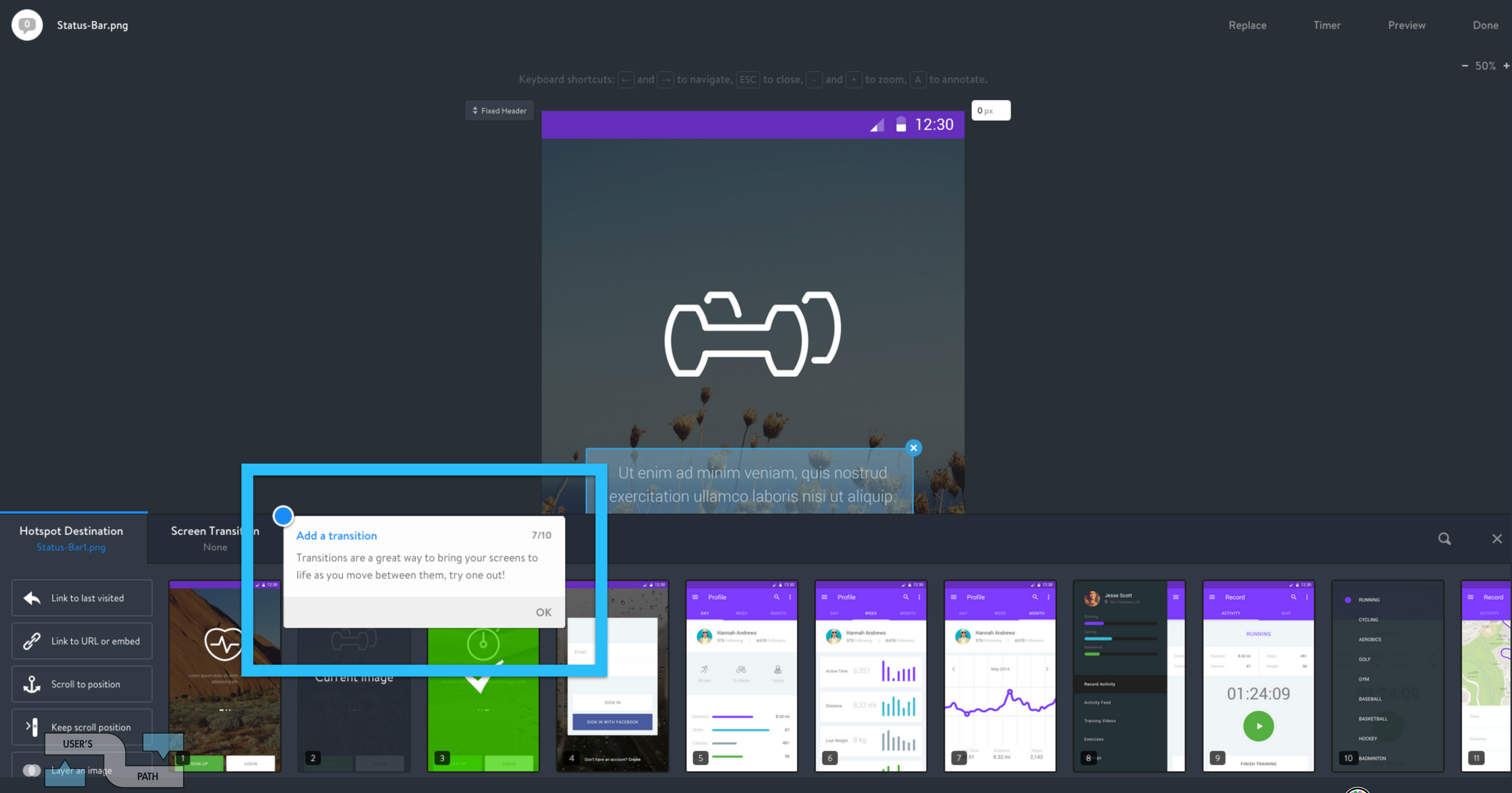
@kryshiggins




Guided interaction

@kryshiggins

‹ CONTRACTS

DRAFT SIGN SEND ACCEPT

KRYSTAL

## PAYMENT

3 OF 4

The Client will pay **a flat fee** of **$ 10,000 USD** .

Before work starts, the Client will pay me a deposit of

**$ 1,000** . For the remaining amount, I'll invoice them

**at the end of the project** .

The Client has **15** day(s) to pay invoices.

Late payments incur a fee of **1** **%** per month.

This contract will start on **Sep 04, 2016** and will end

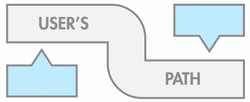
**on a specific date** .

This contract will end on **Oct 04, 2016** .

If either party ends the contract early, the Client will pay

**a pro-rated amount for the time worked** .

CONTINUE




Guided interaction

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@kryshiggins

‹ CONTRACTS

DRAFT SIGN SEND ACCEPT

KRYSTAL

## PAYMENT

3 OF 4

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This contract will start on **Sep 04, 2016** and will end **on a specific date** .

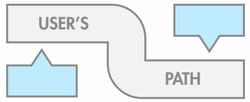
This contract will end on **Oct 04, 2016** .

If either party ends the contract early, the Client will pay **a pro-rated amount for the time worked** .

Want to break payments into milestones? Select "The Client will pay in milestones..."

Not sure what to charge? Use our Freelance Rate Explorer

CONTINUE




Guided interaction

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‹ CONTRACTS

DRAFT SIGN SEND ACCEPT

KRYSTAL

## PAYMENT

3 OF 4

The Client will pay **a flat fee** of **$ 5,000** **USD** .

Before work starts, the Client will pay me a deposit of **$ 1,000** . For the remaining amount, I'll invoice them **at the end of the project** .

The Client has **15** day(s) to pay invoices.

Late payments incur a fee of **1** **%** per month.

This contract will start on **Sep 04, 2016** and will end **on a specific date** .

This contract will end on **Oct 04, 2016** .

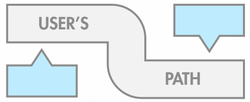
If either party ends the contract early, the Client will pay **a pro-rated amount for the time worked** .

A deposit is usually 20-50% of the total contract budget. The smaller the Client, the more reasonable a higher deposit is.

If you're billing hourly, then estimate the total based on the number of hours you're expecting to work.

**If you don't want a deposit, just enter 0.**

CONTINUE




Guided interaction

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‹ CONTRACTS

DRAFT SIGN SEND ACCEPT

KRYSTAL

## PAYMENT

3 OF 4

The Client will pay **a flat fee** of **$ 5,000** **USD** .

Before work starts, the Client will pay me a deposit of **$ 100** . For the remaining amount, I'll invoice them **at the end of the project** .

The Client has **15** day(s) to pay invoices.

Late payments incur a fee of **1** **%** per month.

This contract will start on **Sep 04, 2016** and will end **on a specific date** .

This contract will end on **Oct 04, 2016** .

If either party ends the contract early, the Client will pay **a pro-rated amount for the time worked** .

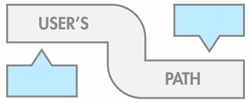
For small to medium-sized Clients, allowing 15 or 30 days to pay an invoice ("Net 15 / 30") is common. For larger Clients, allowing 30, 60, or 90 ("Net 30 / 60 / 90") days is common.

Late fees are generally between 2% and 10%. The higher the fee is (within reason), the more likely you'll be paid on time.

The late fee is non-compounding, and is calculated each month after the invoice's due date.

**If you don't want a late fee, just enter 0.**

CONTINUE



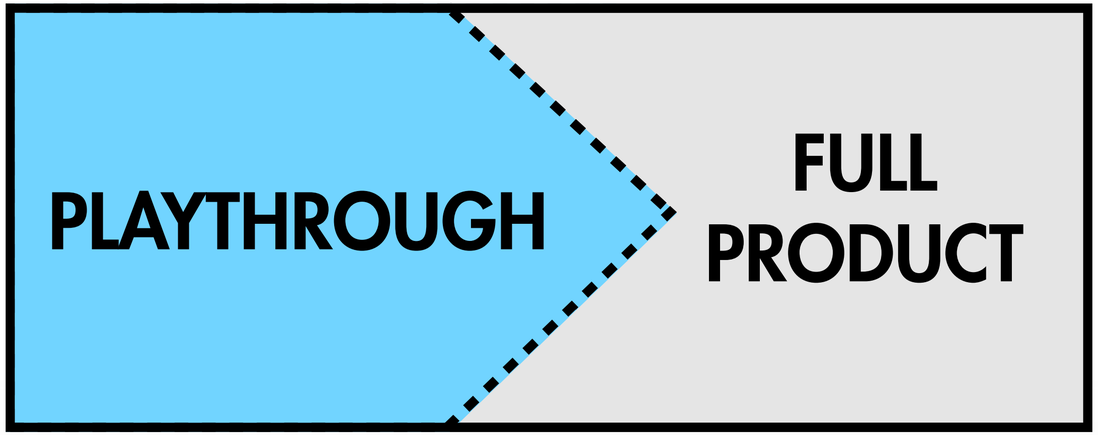

Guided interaction

Screenshot © 2016 Bonsai Inc, used with permission

@kryshiggins

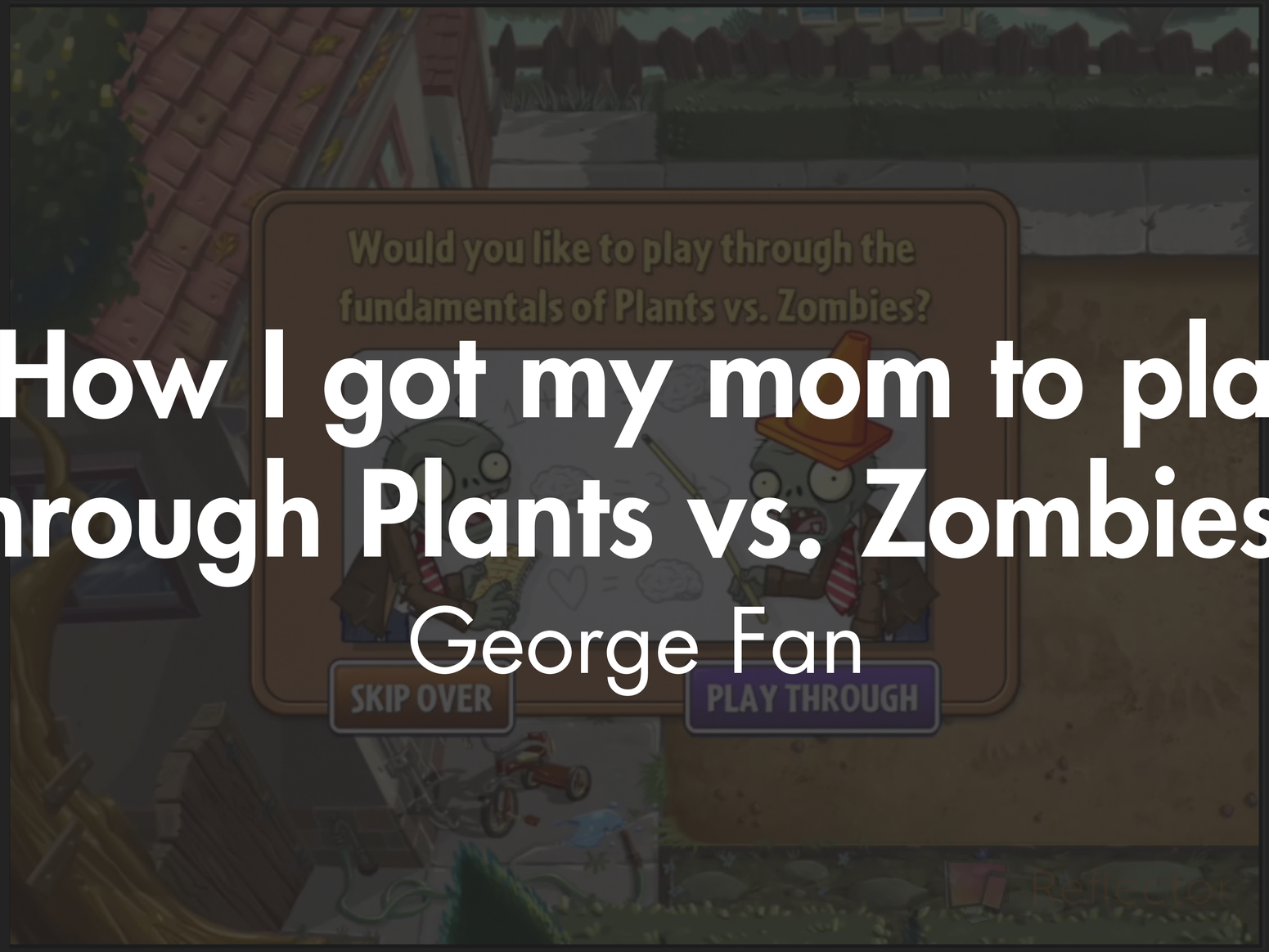
# Pattern: Playthrough

An authentic, protected space
to learn core skills



# “How I got my mom to play through Plants vs. Zombies”

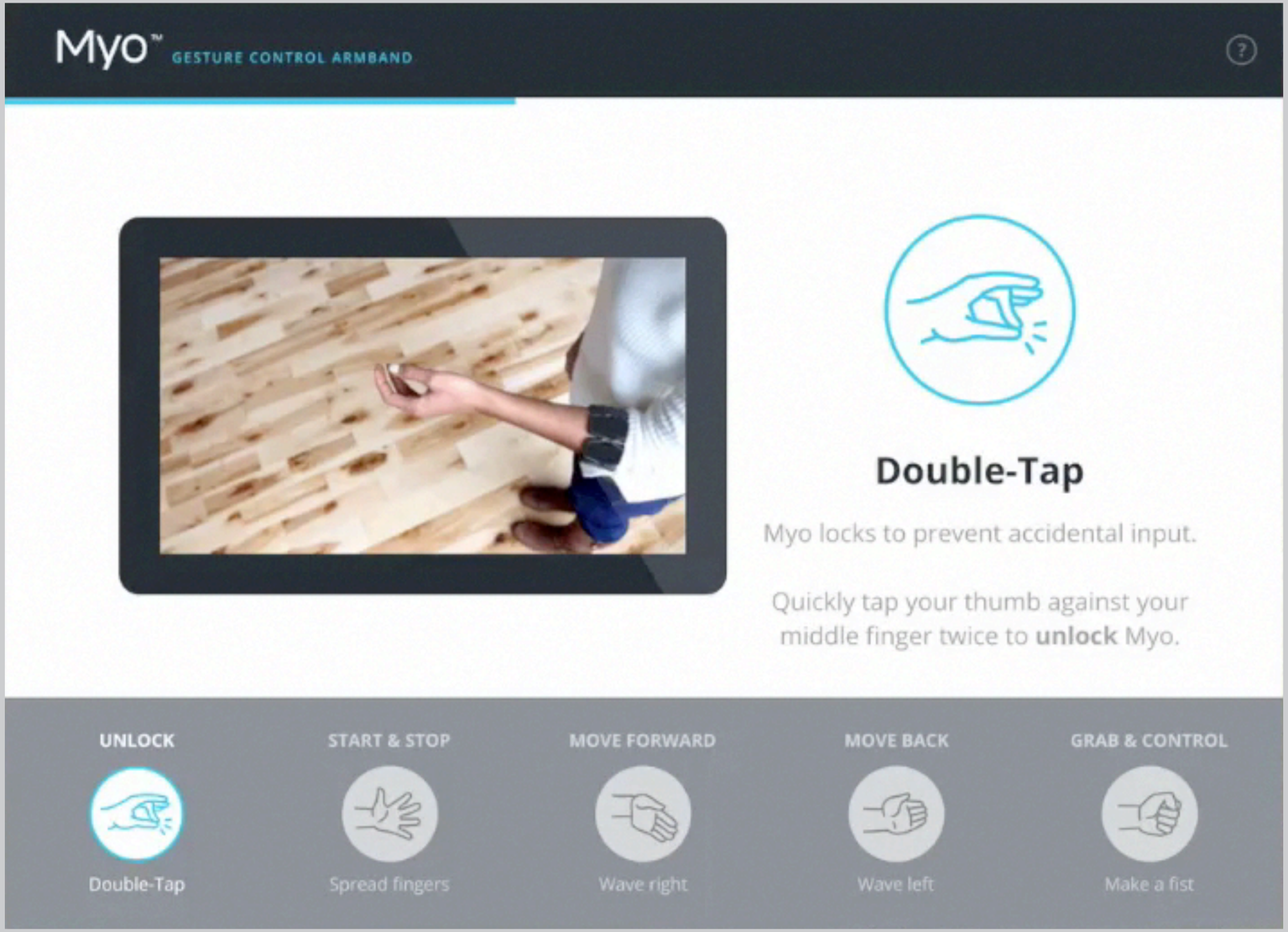
George Fan



Guided interaction

Plants vs. Zombies™ 2 ©2016 Electronic Arts Inc. All rights reserved. Used with permission

@kryshiggins

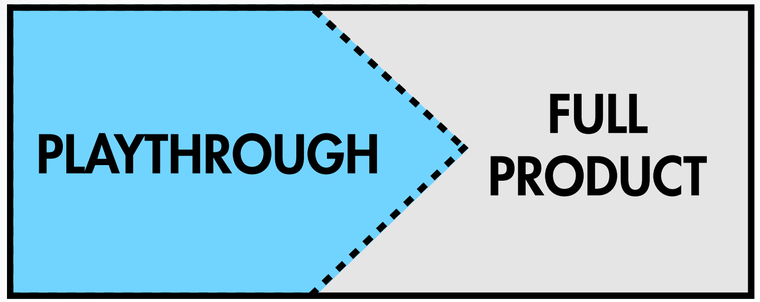



PLAYTHROUGH FULL PRODUCT

Guided interaction

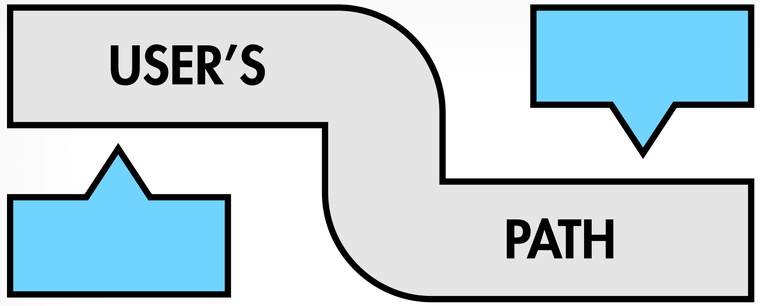
Screenshot © 2016 Thalmic Labs, used with permission

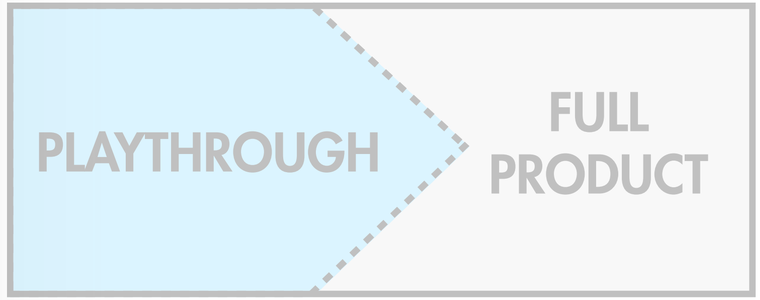
@kryshiggins




# Playthrough, best for:

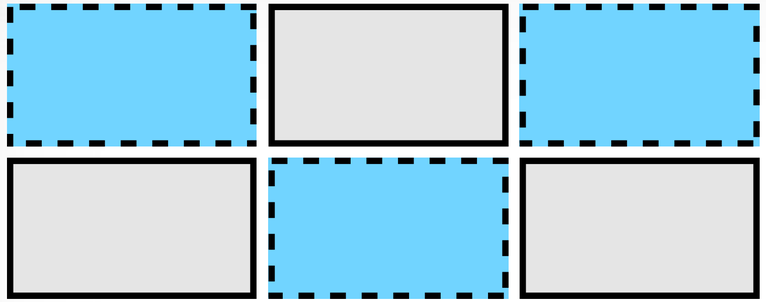
- New interaction models
- Critical skills

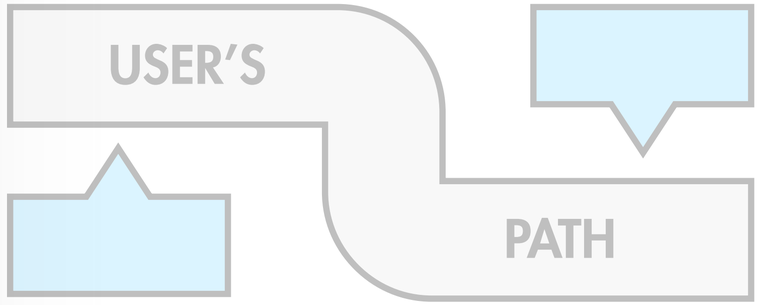


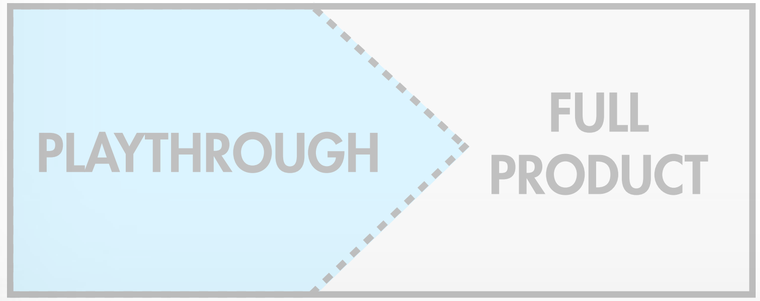




# User guided tutorial, best for:

- Task instruction






# Inline cues, best for:

- Content browsing
- Supplemental education
- Empty states

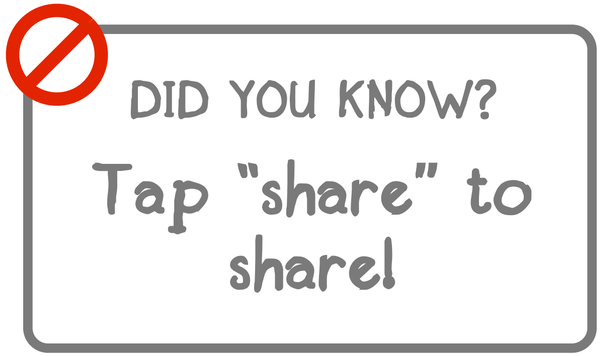
# Good guidance:

- Facilitates exploration in an **authentic space**
- **Gradually** engages
- Provides **actionable** next steps

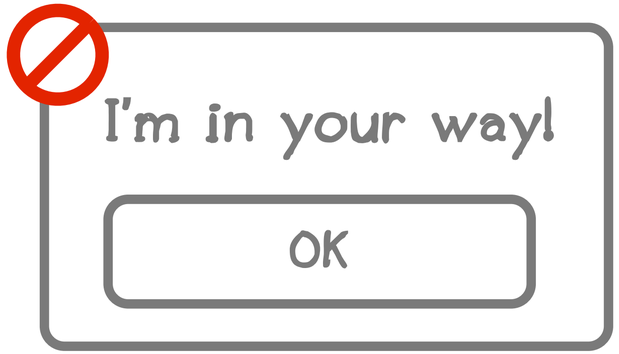
# Good guidance:

- Facilitates exploration in an **authentic space**
- **Gradually**
- Provides
- ⊘ **Won’t overdo it**

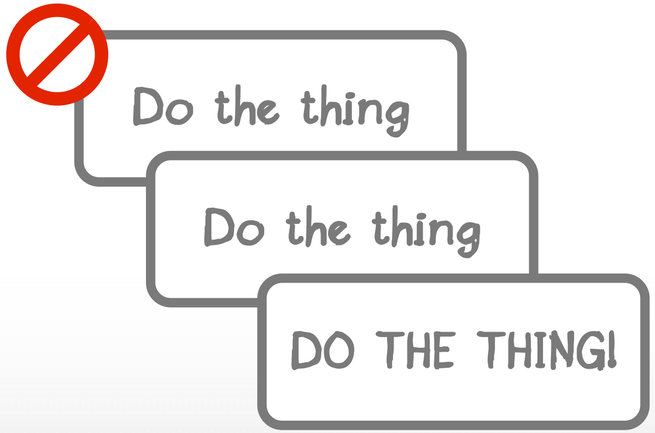
## Avoid wasting time



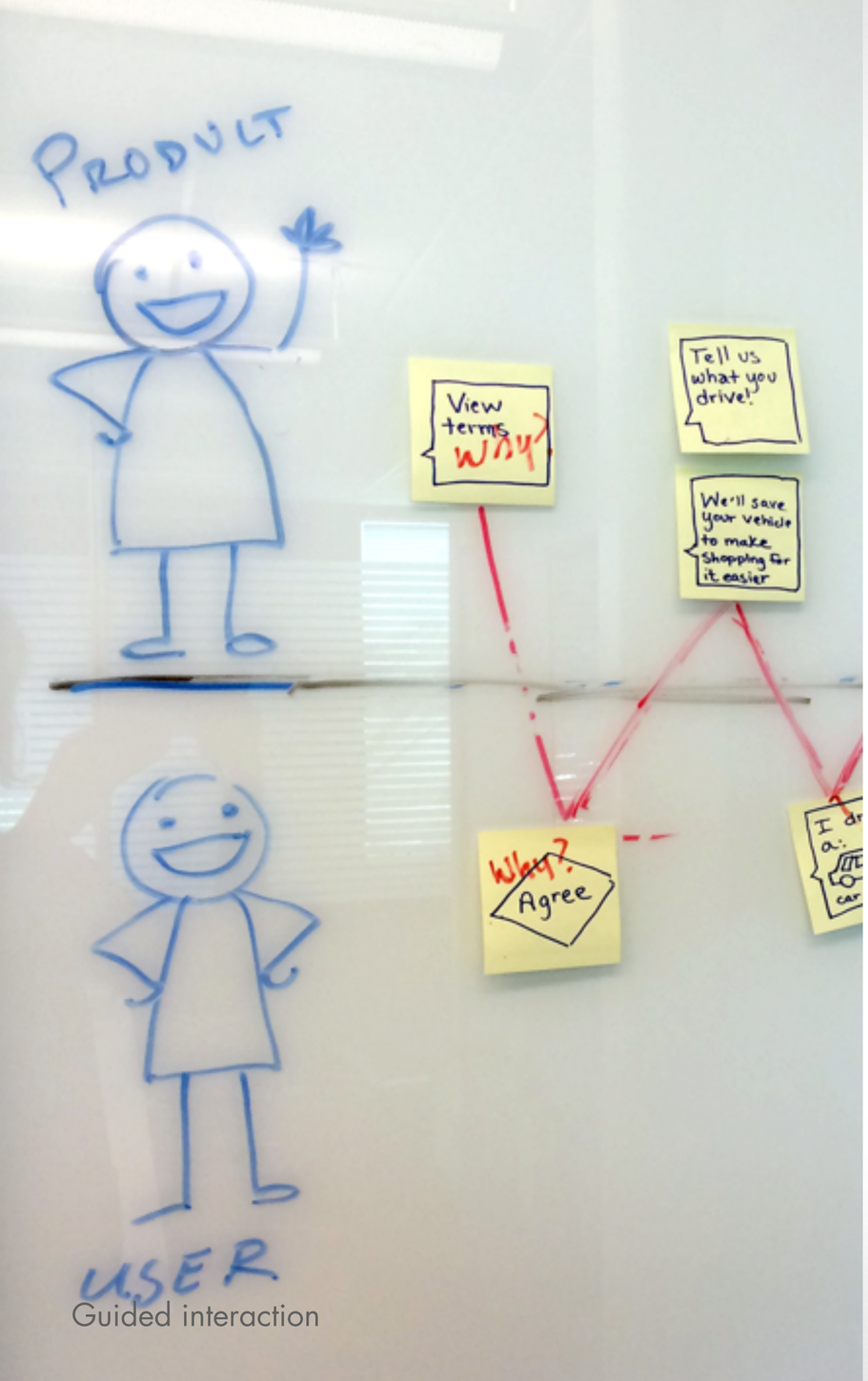

## Avoid modals




## Avoid repetition




## Allow escape

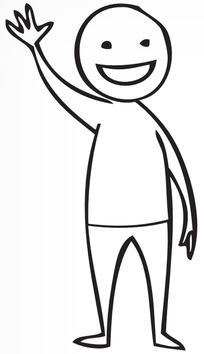



Guided interaction

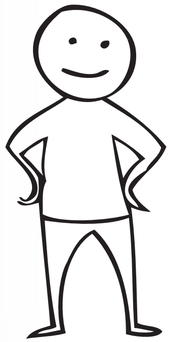
Take-home exercise

# What's your coaching cadence?

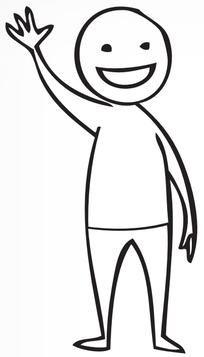
YOUR SITE



YOUR USER

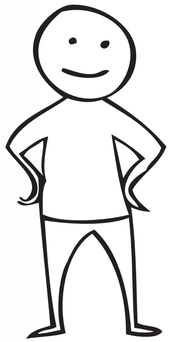


YOUR SITE

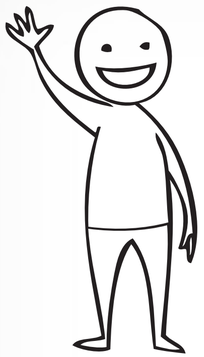


**Welcome! What do you drive?**

YOUR USER

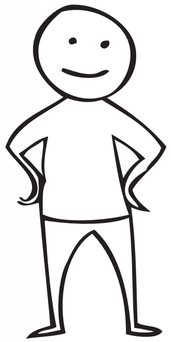


YOUR SITE



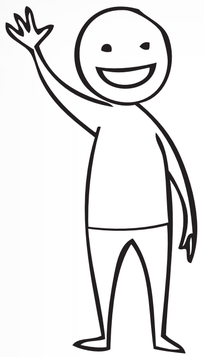
**Welcome! What do you drive?**

YOUR USER



**2014 Nissan Leaf**

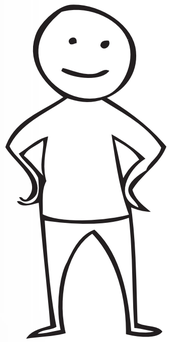
YOUR SITE



Welcome! What do you drive?

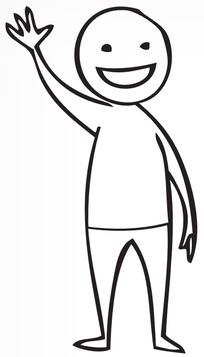
Save your vehicle?

YOUR USER



2014 Nissan Leaf

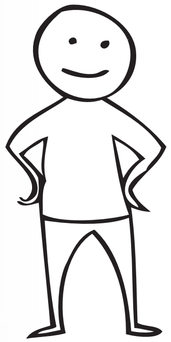
YOUR SITE



Welcome! What do you drive?

Save your vehicle?

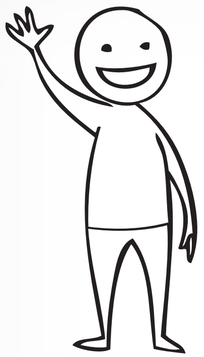
YOUR USER



2014 Nissan Leaf

Save

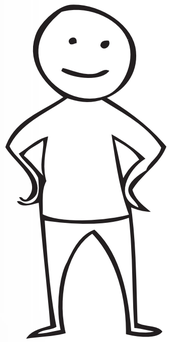
YOUR SITE



Welcome! What do you drive?

Save your vehicle?

YOUR USER

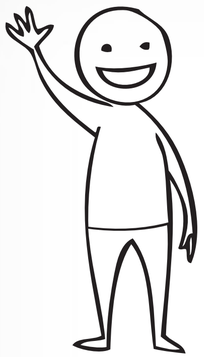


2014 Nissan Leaf

Save

Browse parts

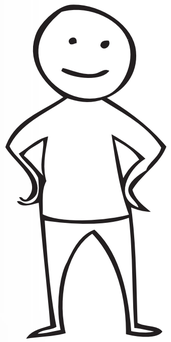
YOUR SITE



Welcome! What do you drive?

Save your vehicle?

YOUR USER

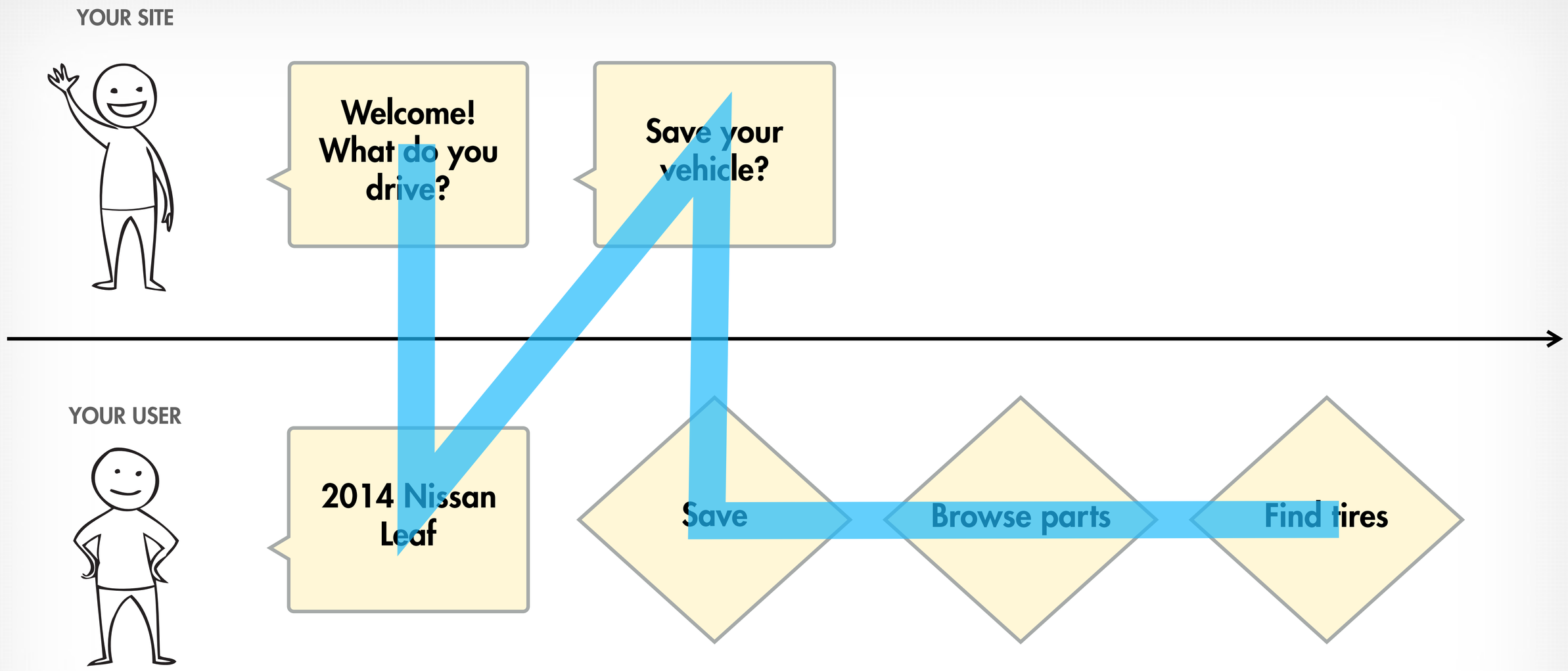


2014 Nissan Leaf

Save

Browse parts

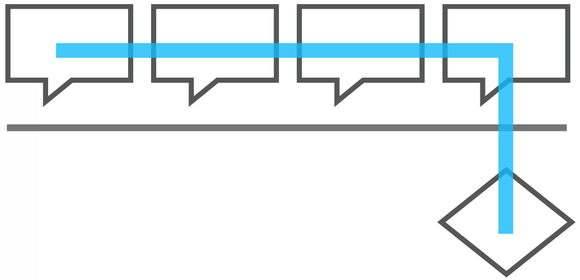
Find tires



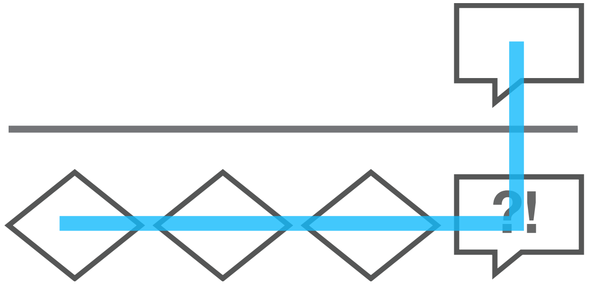

Guided interaction

@kryshiggins

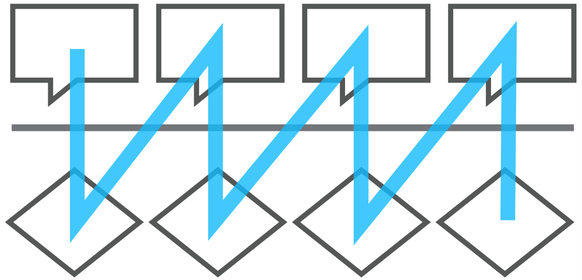
## Product overweighted



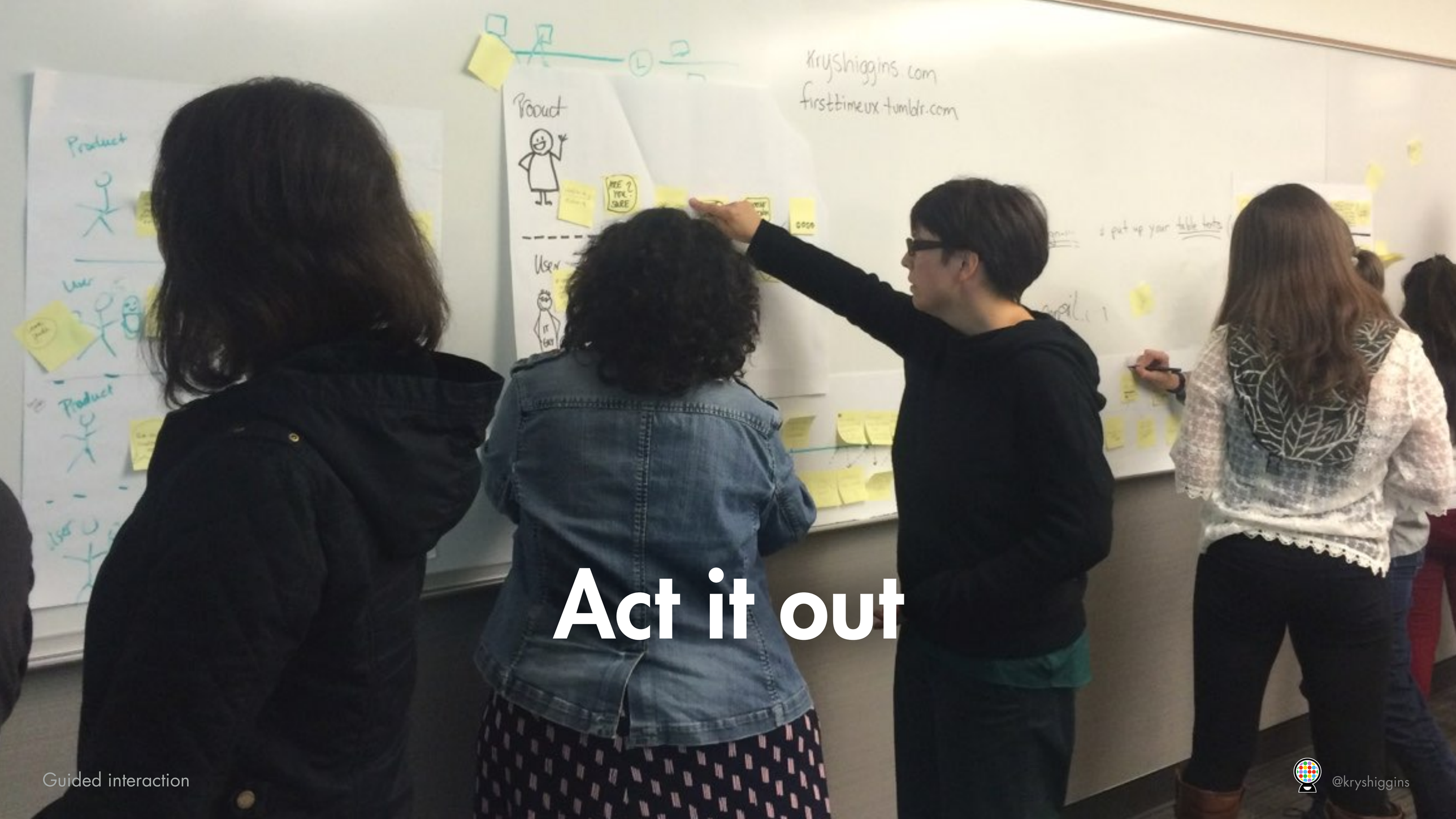
## User overweighted




## Over-coaching*



*Your mileage may vary


Product
User
Product
User
Product
User
Krysh iggins.com
firsttimeux.tumblr.com
put up your table tents

# Act it out

# Hopscotch

linkedin.github.io/hopscotch

### Event Callbacks

Callbacks for tour events: onStart, onEnd, onShow, onNext, onPrev, onClose, onError

### Multi-page tours

Take your tour across pages! Hopscotch saves state using HTML5 sessionStorage if available and falls back to using cookies as a default.

### i18n support

Create tours in all the languages of the world. Hopscotch supports customizing the language of your tour controls.

### Lightweight Callouts

Create single instance callouts for those times when one is enough.

## General Usage

To get started using the Hopscotch framework, simply include `hopscotch.css` and `hopscotch.js` on your page. This will load the hopscotch object into the global window object for you.

```
<html>
  <head>
    <title>My First Hopscotch Tour</title>
    <link rel="stylesheet" href="css/hopscotch.css"></link>
  </head>
  <body>
    <h1 id="header">My First Hopscotch Tour</h1>
    <div id="content">
      <p>Content goes here...</p>
    </div>
    <script src="js/hopscotch.js"></script>
```

# Appcues

appcues.com

Hotspots

Upgrade

Location > Design > **Settings**

Publish

Choose who sees this

- All users
- Users matching a saved segment
- Users with specific properties

Last Page URL | is exactly | e.g. http://example.com/billing

Add filter

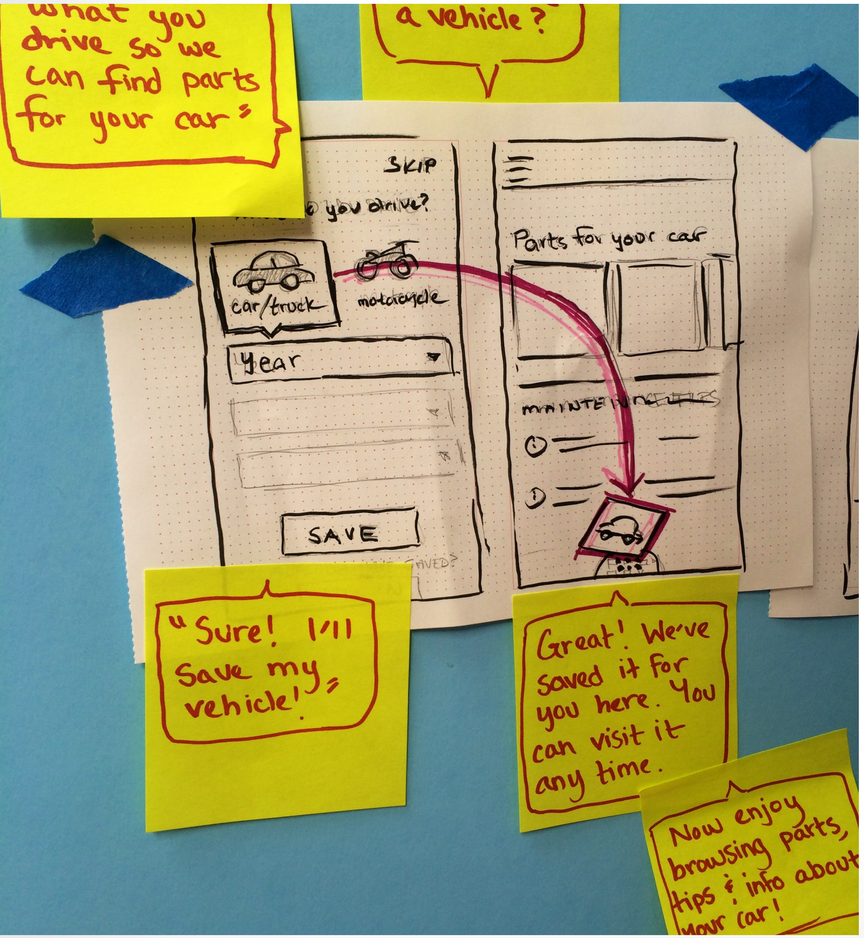
**Heads up!** You haven't installed the Appcues embed script yet. Once you do, all of *your* user properties will automatically appear here for you to create segments. Click here to view installation instructions.

Choose which page(s) this appears on

- Any page
- At a specific URL

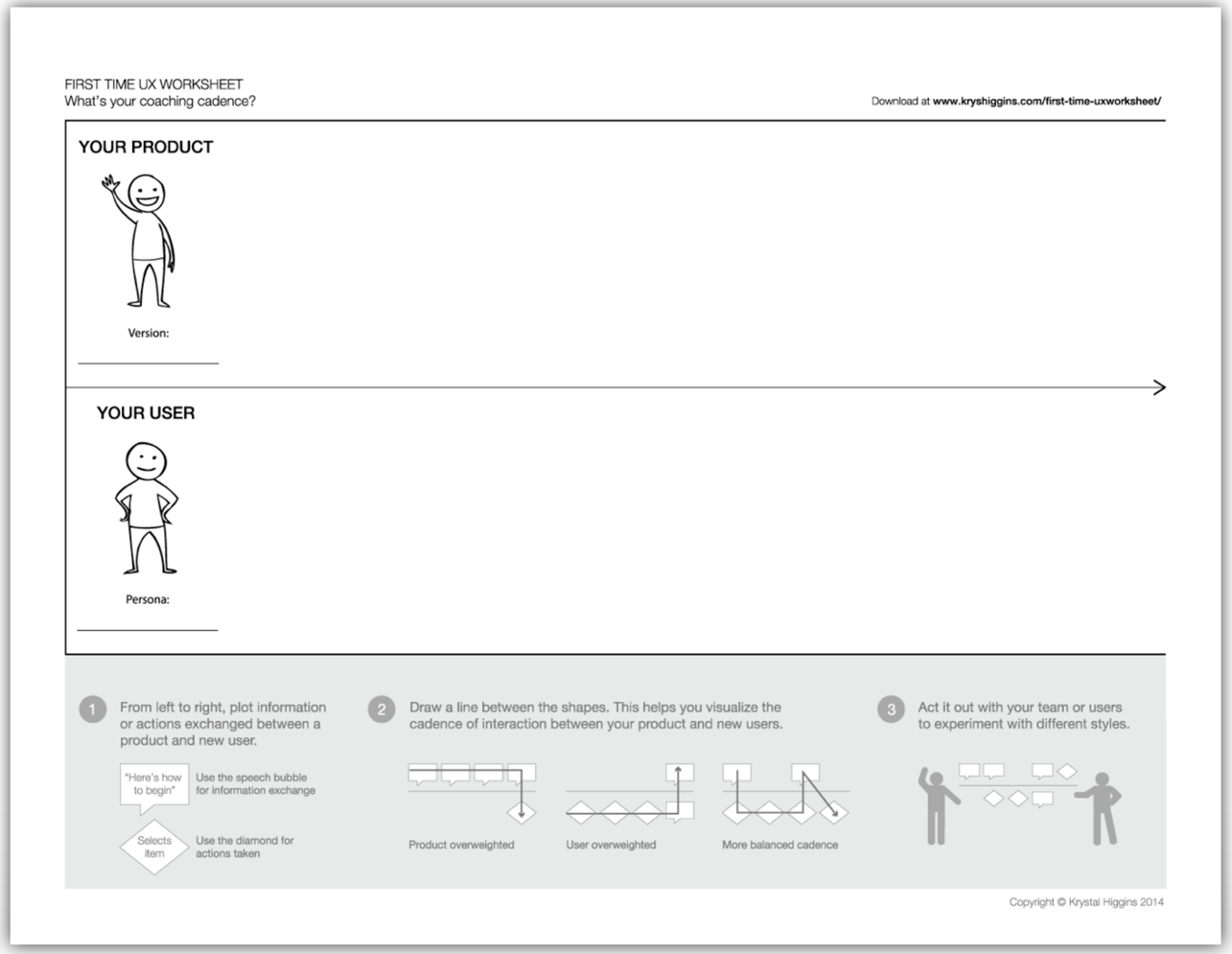
/about/

# Keep the conversation going!




```
<form name="myVeh">
    <h2>Find parts for your vehicle</h2>
    <!--US: Are you looking for parts that fit
vehicle?
          Tell us what you drive, and we'll ma
     easier to shop!-->
    <div id="typeVeh">
        <label>My Vehicle</label>
        <input type="radio" value="Vehicle"
name="carTruck">
    <!--USER: Sounds great! I drive a car / tr
        <input type="radio" value="Vehicle"
name="motorcycle">
     <!--USER: Sounds great! I drive a motorcy
        ...
    </div>
</form>
    <!--USER: Actually, I don't drive anything
shop for a car?-->
    <!--US: Of course! Tell us the kind of car
looking for-->
<form name="newVeh">
    <h2>Shop for cars, trucks or motorcycles</
```

# kryshiggins.com/**coach**



FIRST TIME UX WORKSHEET
What's your coaching cadence?

Download at **www.kryshiggins.com/first-time-uxworksheet/**

**YOUR PRODUCT**

Version:

**YOUR USER**

Persona:

1. From left to right, plot information or actions exchanged between a product and new user.

"Here's how to begin" — Use the speech bubble for information exchange

Selects item — Use the diamond for actions taken

2. Draw a line between the shapes. This helps you visualize the cadence of interaction between your product and new users.

Product overweighted

User overweighted

More balanced cadence

3. Act it out with your team or users to experiment with different styles.

Copyright © Krystal Higgins 2014

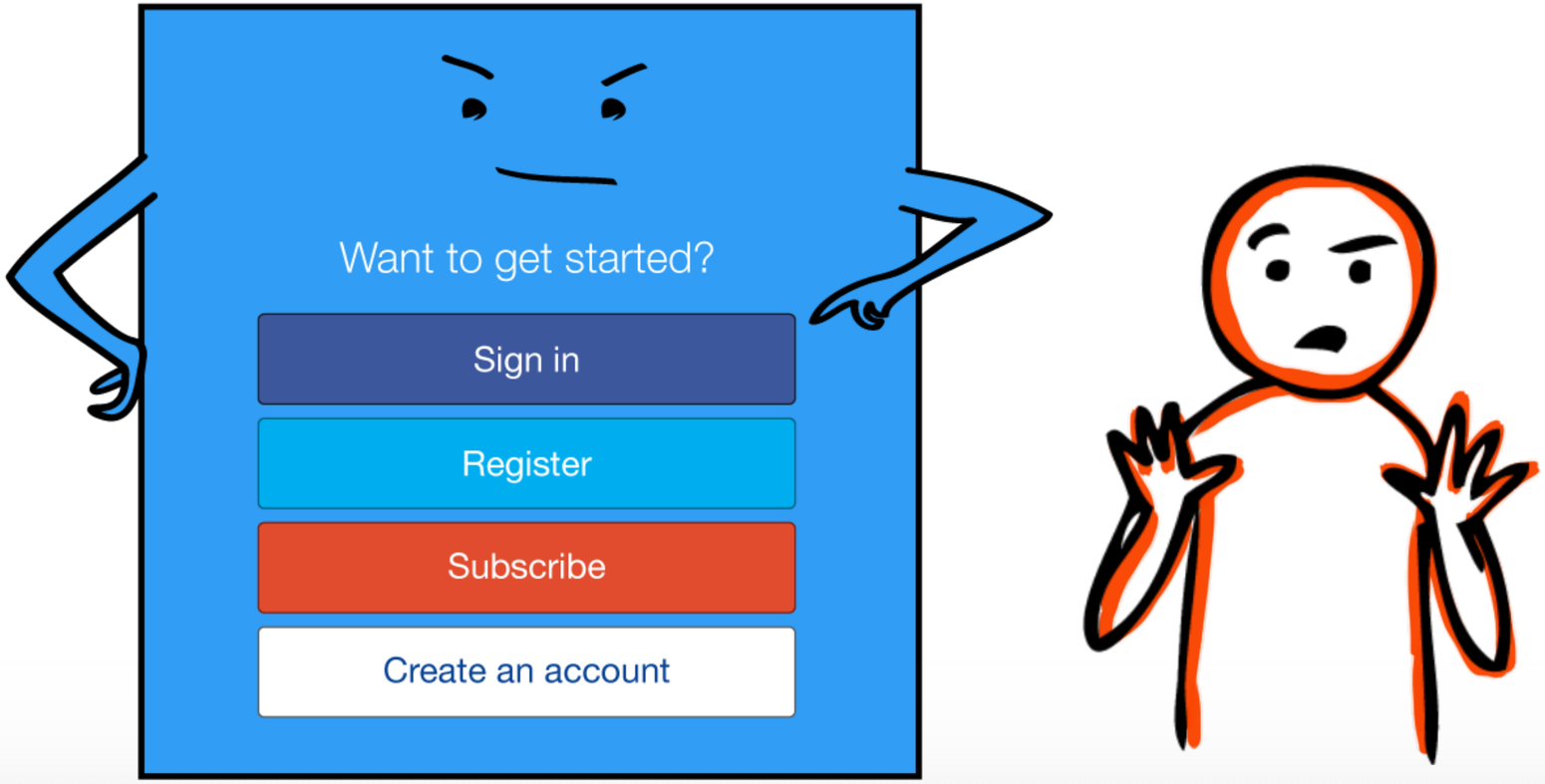
# Onboard new users with:

1. **Guided interaction**
2. Free samples
3. Personal focus

# Onboard new users with:

1. Guided interaction
2. **Free samples**
3. Personal focus

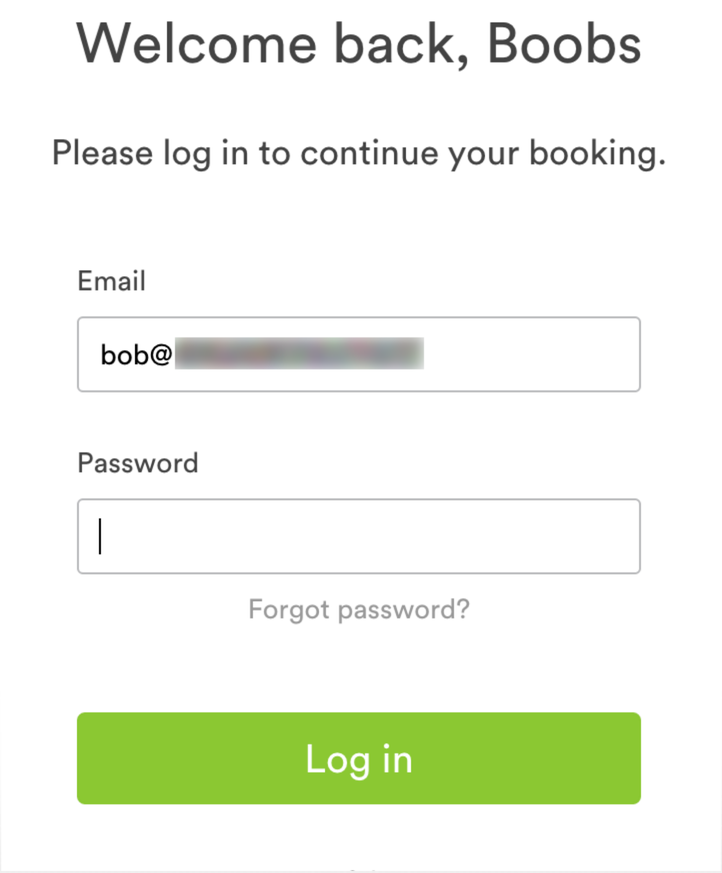
# Forced sign-up may cause 54% to leave





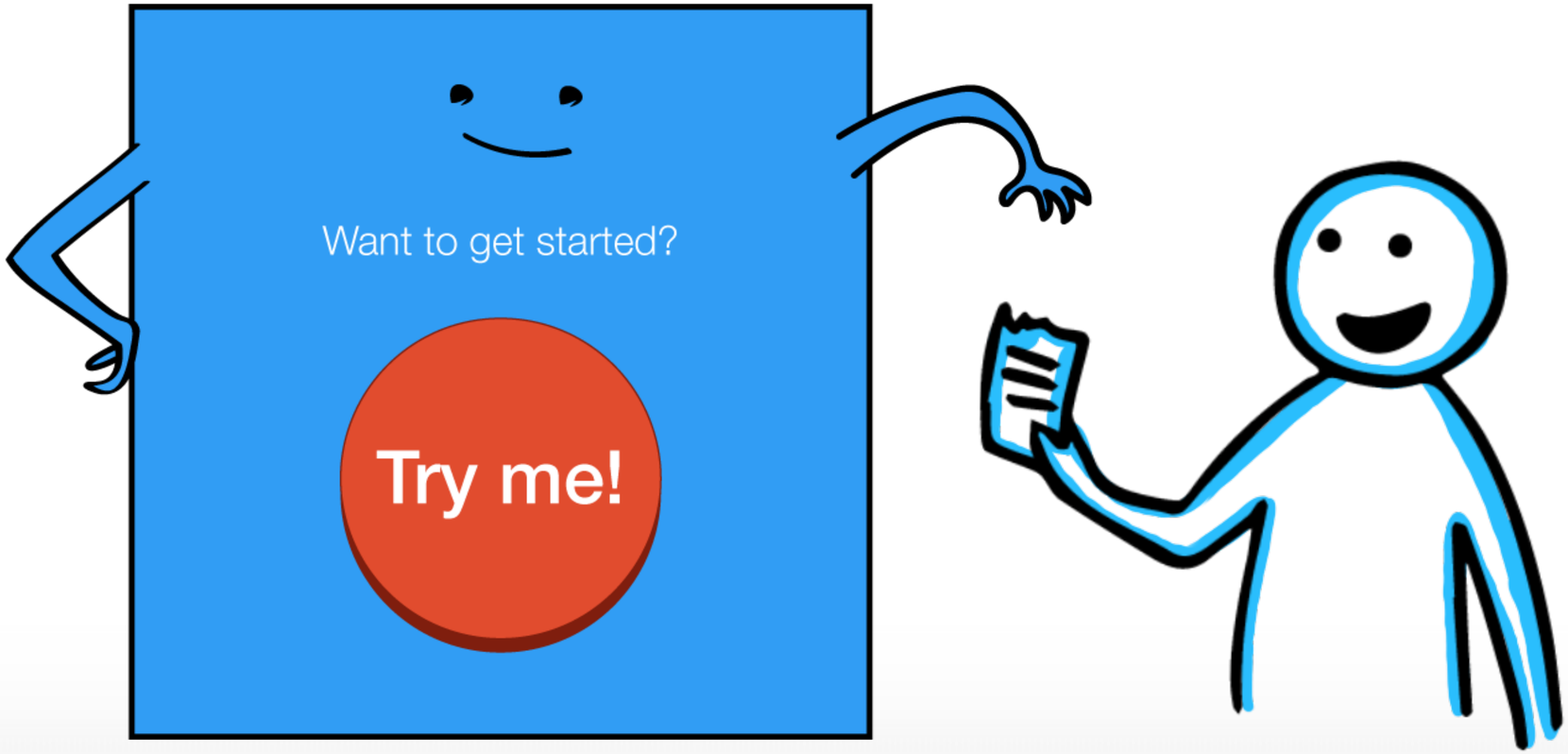

Source: Janrain, January 2012

# Forced sign-up may cause 88% to lie




Source: Janrain, January 2012

# 60% would give more if they knew how it would be used






Source: Janrain, January 2012

# Reciprocity

A perceived obligation to return favors

Free samples

# Mints + check =
# 3% increase in tips

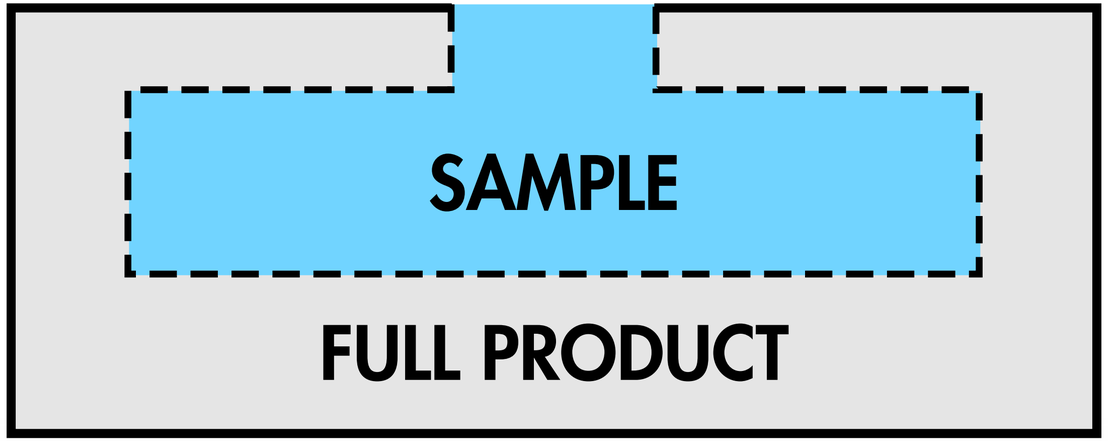
Free samples

Journal of Applied Social Psychology 2002
Sweetening the Till: The Use of Candy to Increase Restaurant Tipping.

@kryshiggins

# Pattern: Free sample

A portion of your value proposition accessible without an account



UNIVERSAL college APPLICATION

HOME REGISTER COLLEGES RESOURCES LOGIN

Finding and applying to the college that is right for you can be tricky sometimes. The Universal College Application is here to help.

Name
Major
Location
Featured College

Find a College by Name

College Name

Begin typing a college name above to find a UCA college.

## GET STARTED

### APPLICANT REGISTRATION

Whether you are applying for first year or transfer admission, the first step is to create a Universal College Application account.

Register as an Applicant

### RECOMMENDER REGISTRATION

If you are a high school or college professional, create an account to begin the recommendation process.

Register as a Recommender

### DOWNLOAD THE FORMS

Want to download PDF copy of the UCA forms for you or your recommender?

Go to UCA Resources

### CONTACT THE UCA

Need to reach a member of the UCA team or connect with the UCA online?

Connect with the UCA

### GET TECHNICAL SUPPORT

Do you have a question about how to complete a part of the UCA Online?

Go to Support

Free samples

Screenshot © 2016 ApplicationsOnline, LLC. All rights reserved. Used with permission

@kryshiggins

wealthfront

Assess Your Risk Tolerance > View Your Plan > Open Account

Let's get to know you

## What are you looking for in a financial advisor?

- [x] I'd like to create a diversified investment portfolio
- [x] I'd like to save money on my taxes

  So do we! That's why Wealthfront offers our Continuous Tax-Loss Harvesting service in an attempt to reduce your investment and overall taxes.
- [x] I'd like someone to completely manage my investments, so that I don't have to
- [ ] I'd like to match or beat the performance of the markets

Back Continue

WHO WE ARE WHAT WE DO BLOGS RESOURCES LEGAL CONTACT



Screenshot © 2016 Wealthfront Inc, used with permission

wealthfront | Who We Are | FAQ | Blog | 650.249.4250 | Contact Us | LOG IN | OPEN AN ACCOUNT

1. Assess Your Risk Tolerance > 2. View Your Plan > 3. Open Your Account

Your Risk Tolerance

− 7.5 +

Change My Answers

Amount to Invest

$50,000

($500 minimum)

How do I decide?

## Taxable Investment Mix

*for Individual, Joint & Trusts*

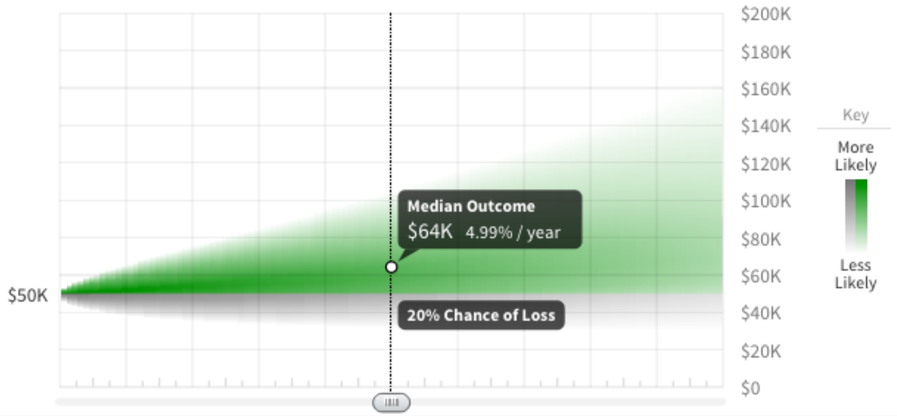
## Retirement Investment Mix

*for 401(k) Rollovers, Traditional, Roth & SEP*

Why this mix?
Can I change it?
Why Vanguard?

| ASSET CLASS | INVESTMENT | % | AMOUNT |
|---|---|---|---|
| U.S. Stocks | Vanguard VTI ETF | 35% | $17,500 |
| Foreign Stocks | Vanguard VEA ETF | 21% | $10,500 |
| Emerging Markets | Vanguard VWO ETF | 16% | $8,000 |
| Dividend Stocks | Vanguard VIG ETF | 8% | $4,000 |
| Natural Resources | State Street XLE ETF | 5% | $2,500 |
| Municipal Bonds | iShares MUB ETF | 15% | $7,500 |

Projected Performance | Historical Performance | Your Costs




*Let us do it for you...*

Open an Account

Save your Plan

What about:

- Fees?
- Rebalancing?
- Minimizing my taxes?
- My brokerage account?
- My house?
- My savings?
- "Play money"?
- Account types?
- Accounts under $5,000?

See more questions



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wealthfront Who We Are FAQ Blog 650.249.4250 | Contact Us LOG IN OPEN AN ACCOUNT

1. Assess Your Risk Tolerance > 2. Vie

Your Risk Tolerance

0 2 4 6 8 10

7.5

Change My Answers

Amount to Invest

$50,000

($500 minimum)

How do I decide?

Taxable Inv

*for Individual, Joi*

*th & SEP*

AMOUNT

$17,500

$10,500

$8,000

$4,000

$2,500

$7,500

Why this mix?

Can I change it?

Why Vanguard?

Municipal Bonds iShares MUB ETF 15%

Projected Performance | Historical Performance | Your Costs

$200K $180K $160K $140K $120K $100K $80K $60K $40K $20K $0

$50K

Median Outcome

$64K 4.99% / year

20% Chance of Loss

Key

More Likely

Less Likely

*Let us do it for you...*

Open an Account

Save your Plan

What about:

- Fees?
- Rebalancing?
- Minimizing my taxes?
- My brokerage account?
- My house?
- My savings?
- "Play money"?
- Account types?
- Accounts under $5,000?

See more questions

## Save Your Plan

Enter your email address and we'll send you a link for returning to this plan at a later date.

email address

**Send me periodic Wealthfront updates and news**

Save Plan

We don't spam! See our privacy policy.



Screenshot © 2016 Wealthfront Inc, used with permission

duolingo Home Discussion Immersion Create a profile

## Basics 1

**LESSON 1**

el, hombre, la, mujer, yo, un, una, soy, niño, niña

Begin

**LESSON 2**

él, es, ella, come, tú, eres, usted, manzanas

Locked

**LESSON 3**

pan, como, comes, agua, leche, bebe, bebo, bebes

Locked

0/3 Lessons completed

Test out

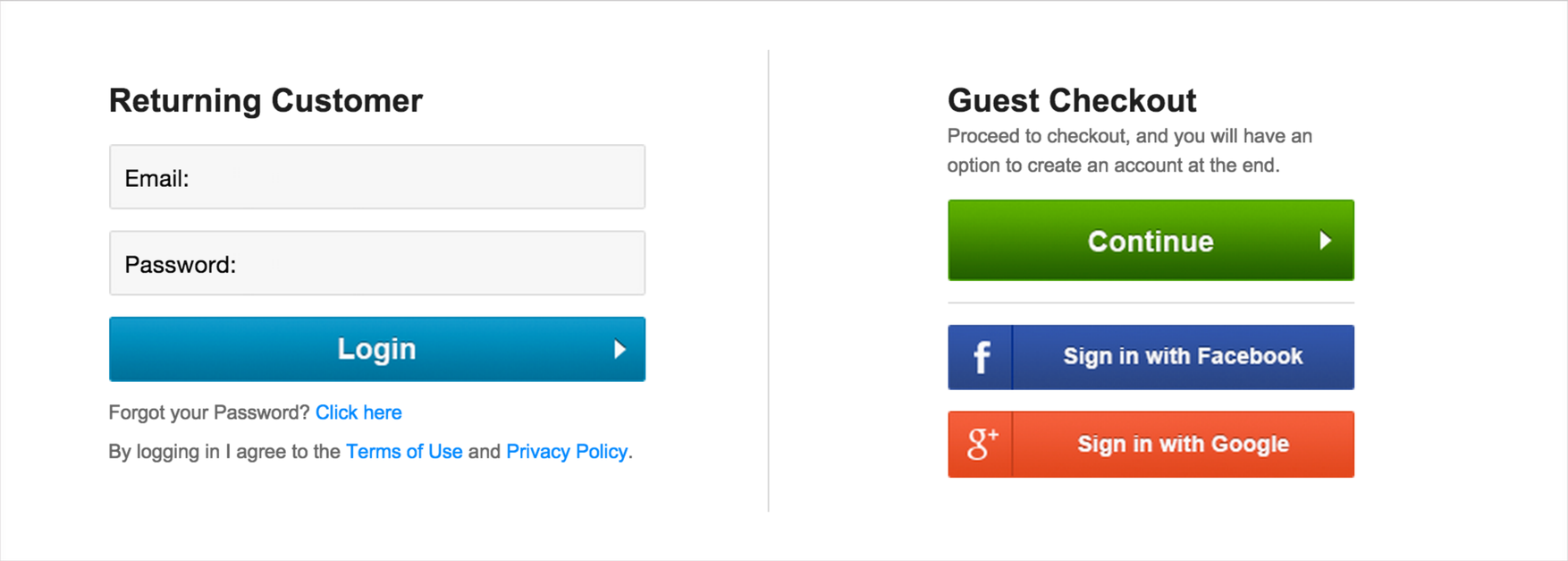
About Test Center Mobile Gear Help Guidelines Jobs Terms Privacy



Screenshot © 2016 Duolingo, used with permission

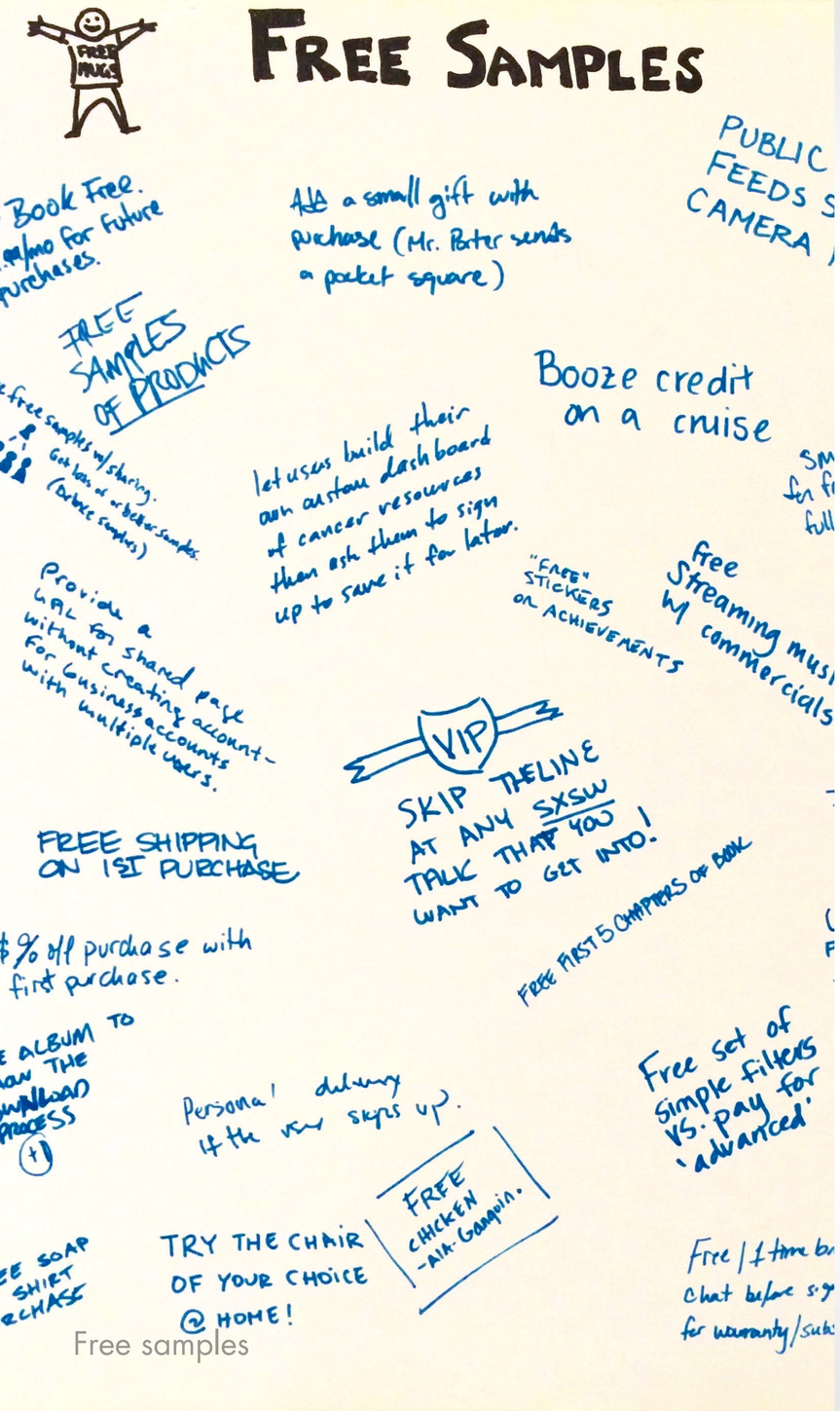
# “The $300 million button”

Jared M. Spool






Screenshot © 2016 Eat24Hours.com, used with permission

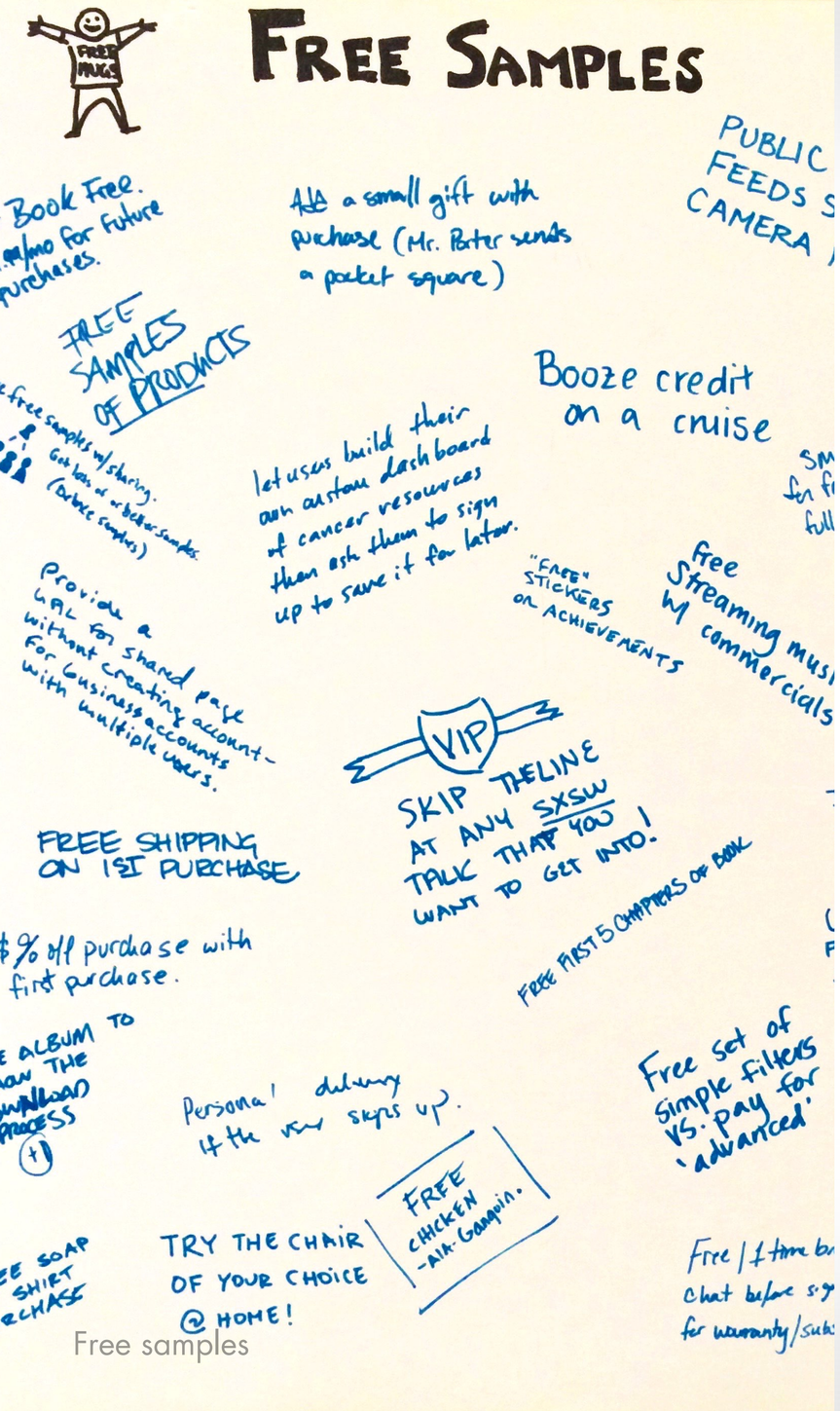


Free samples

# Many options!

- Drafts
- Limited time trials
- Free downloads
- Guest checkout
- Many more

@kryshiggins



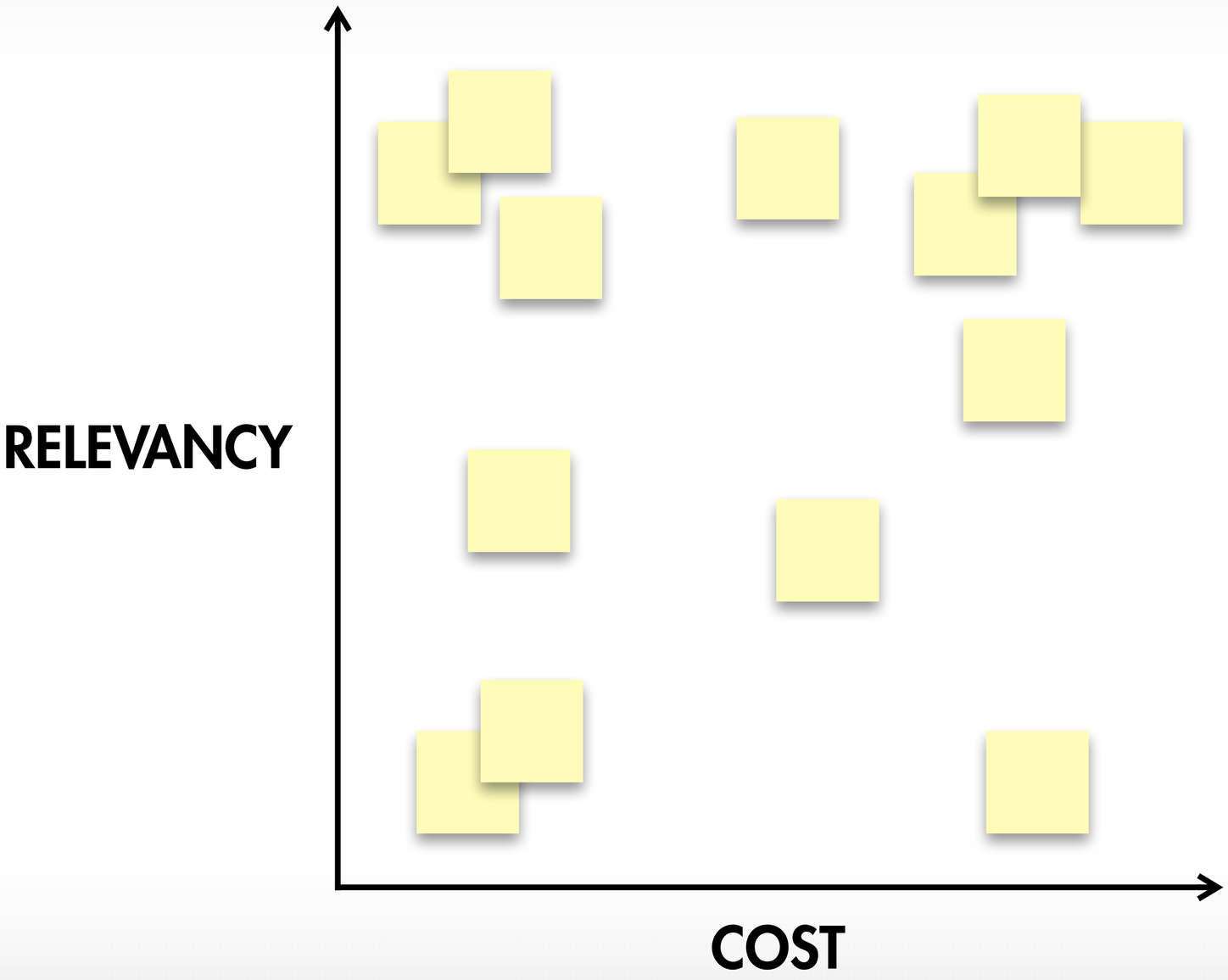

Free samples

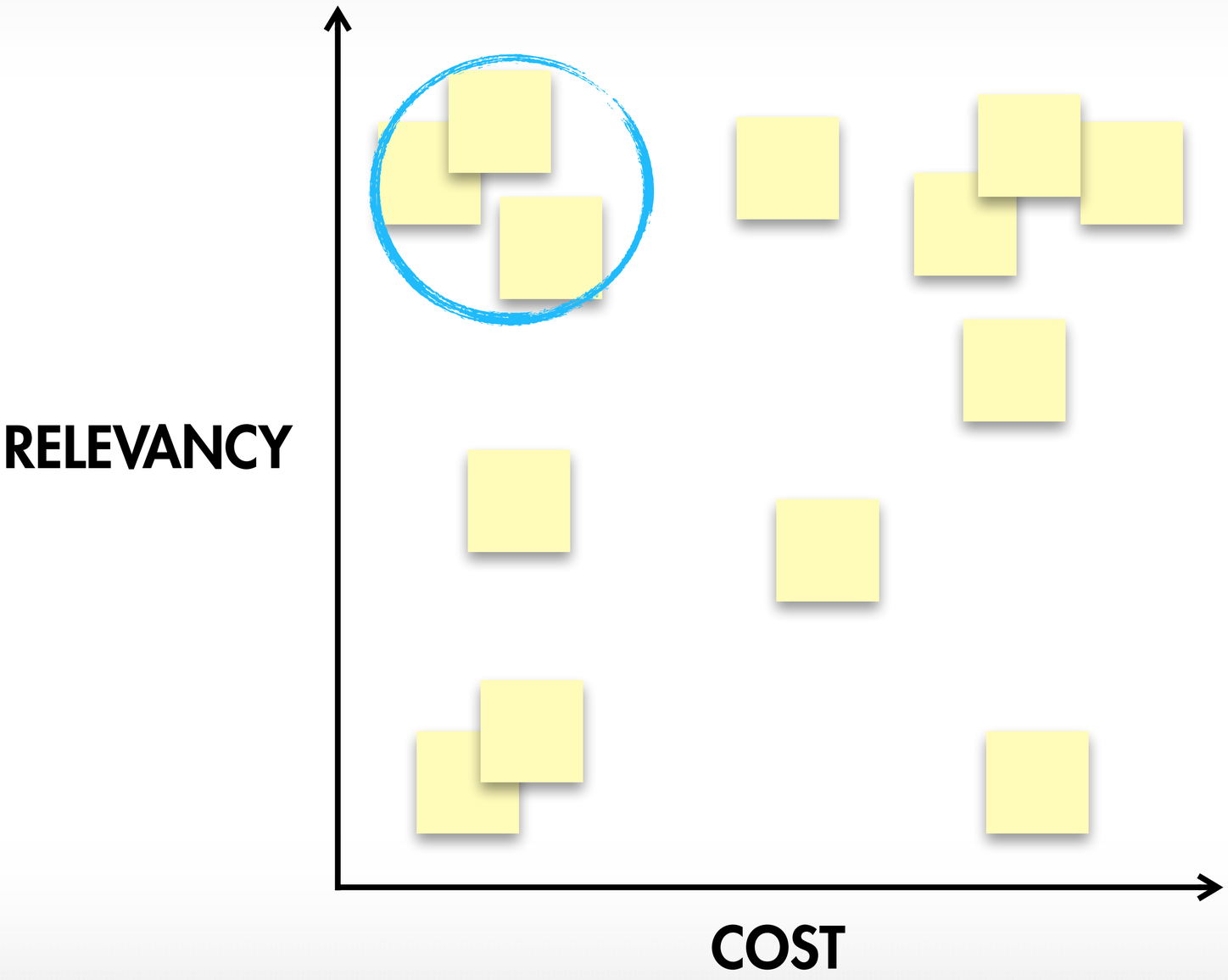
Take-home exercise

# What's your free sample?

Free samples

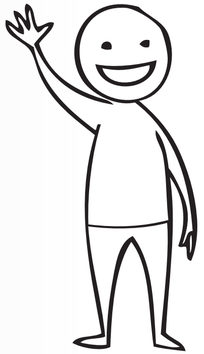
@kryshiggins


RELEVANCY
COST


RELEVANCY
COST

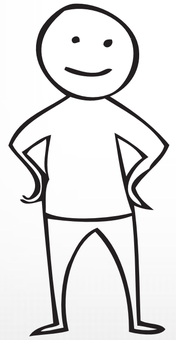
# Create a transition plan

YOUR SITE



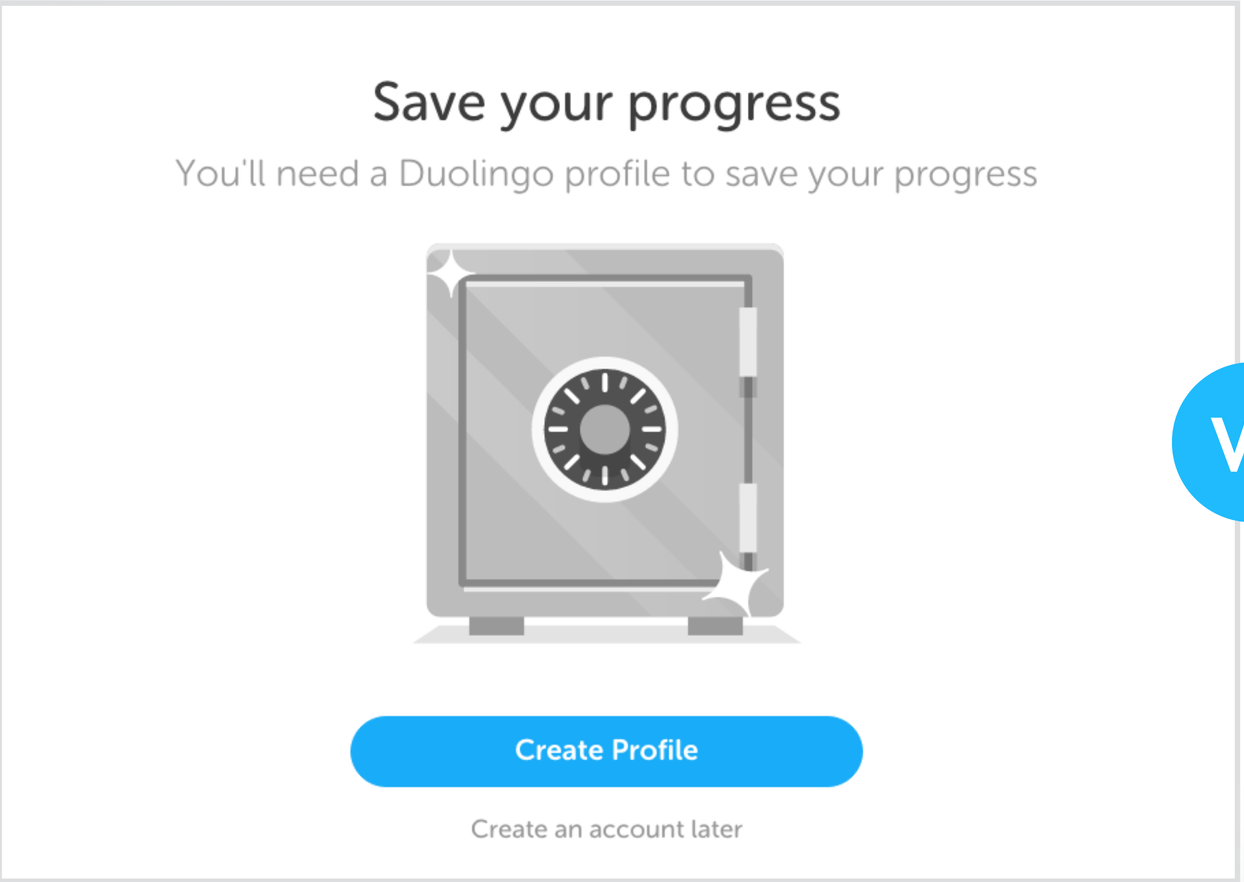
PROMPT

YOUR USER

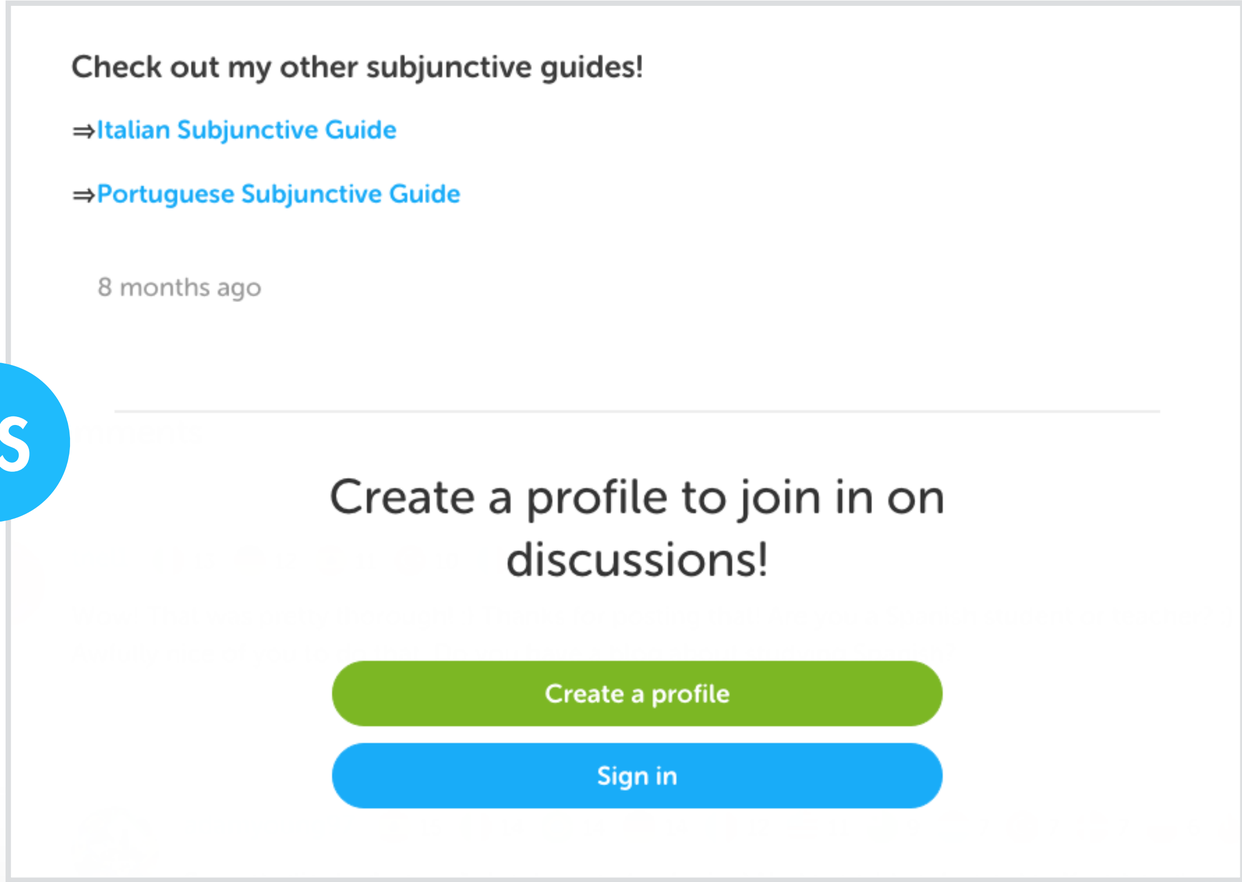


TRIGGER

# Prompt after delivering value




VS



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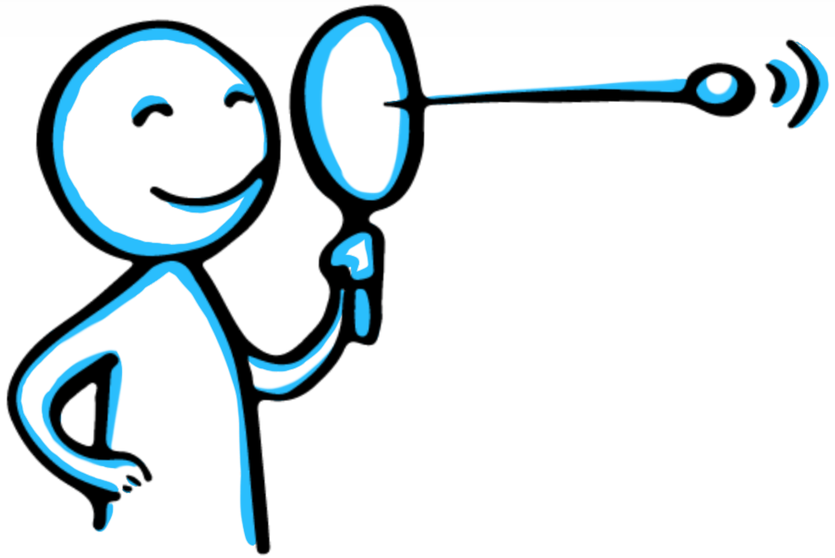

# Measure retention & engagement, not just signups

# Onboard new users with:

1. Guided interaction
2. **Free samples**
3. Personal focus

# Onboard new users with:

1. Guided interaction
2. Free samples
3. **Personal focus**

# "A wealth of information creates a poverty of attention."

- Herbert Simon

**Relevancy**
**drives engagement**

# “Effective teaching involves acquiring relevant knowledge about students.”

CMU Eberly Center Principles of Teaching

# Mints + personal touch = **21% increase in tips**

I thought *you* might want some more mints.

Personal focus

Journal of Applied Psychology
Sweetening the Till: The Use of Candy to Increase Restaurant Tipping.

@kryshiggins

## Explicitly

Learn by requesting

## Implicitly

Learn by inferring

Bucknell UNIVERSITY

I'M LOOKING FOR ... | A-Z DIRECTORY | VISITED PAGES | Search our site ...

NOW
FEB 10
FEB 08
JAN 29
JAN 27
MORE

And this year's Commencement speaker is ...

Customize This Page

Keep what you want to see, hide what you don't.
We'll remember your choices for the next time you visit.

START CUSTOMIZING

Personal focus

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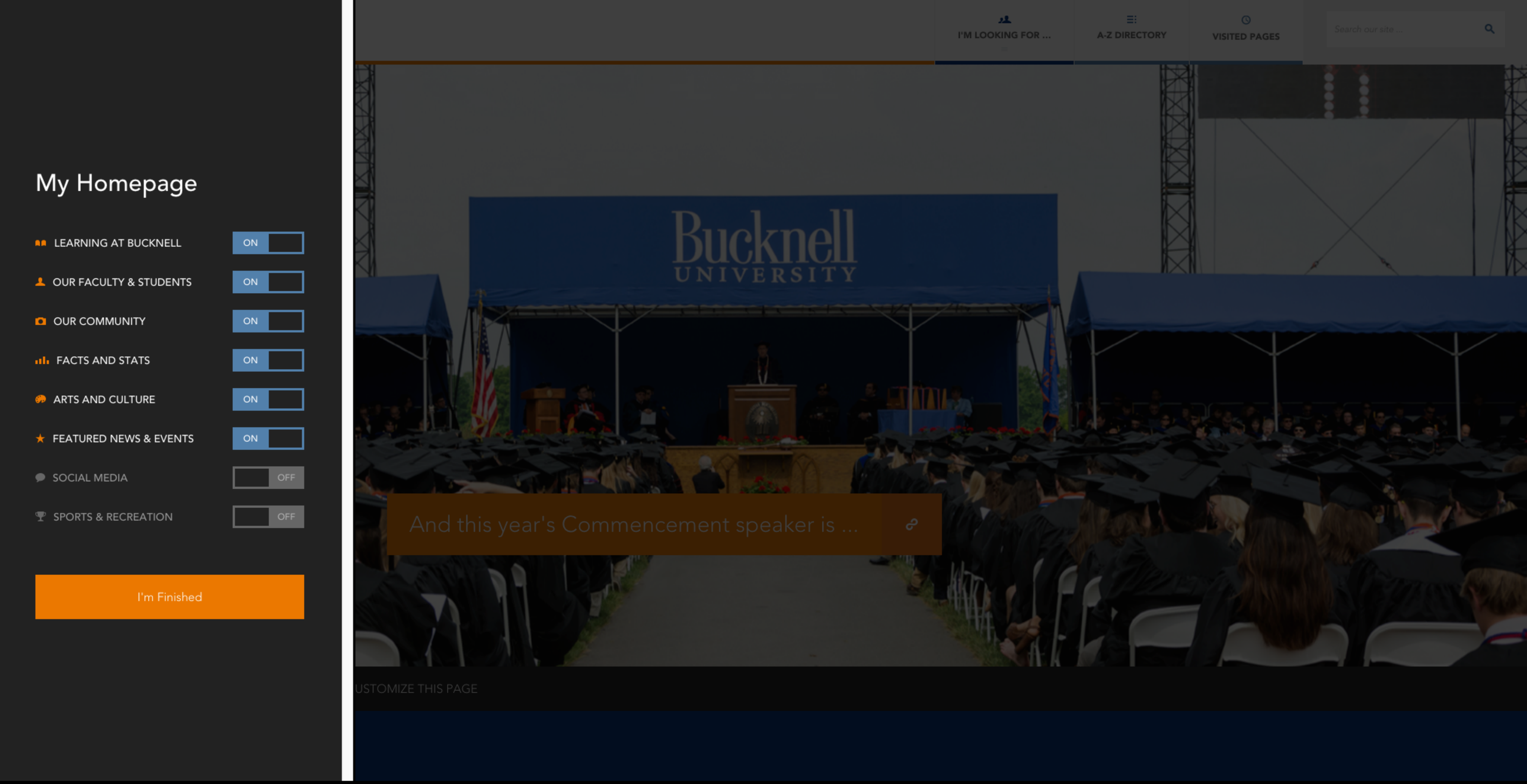
@kryshiggins




Personal focus

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@kryshiggins

VolunteerMatch.org

VOLUNTEERS · NONPROFITS · SIGN IN · REGISTER · Log In · Log In · SUPPORT

# We bring good people & good causes together

Find a cause that lights you up. Get in touch with a nonprofit that needs you.

Join Us  LEARN MORE

## What do you care about in Auburn, ME ?

SEARCH

I care about...

Advanced

or

BROWSE

Advocacy & Human Rights

Animals

Arts & Culture

Board Development

Personal focus

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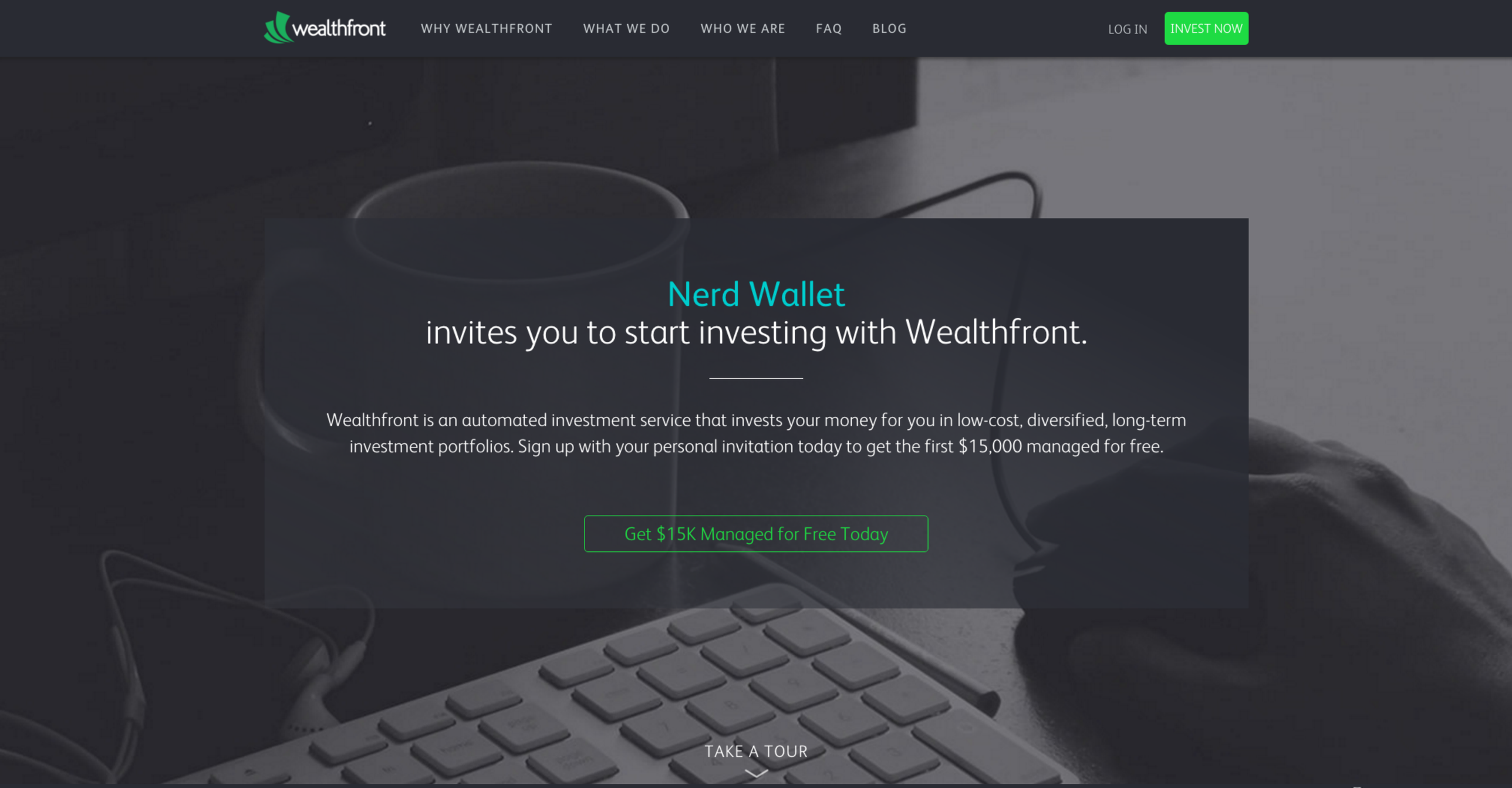


Personal focus

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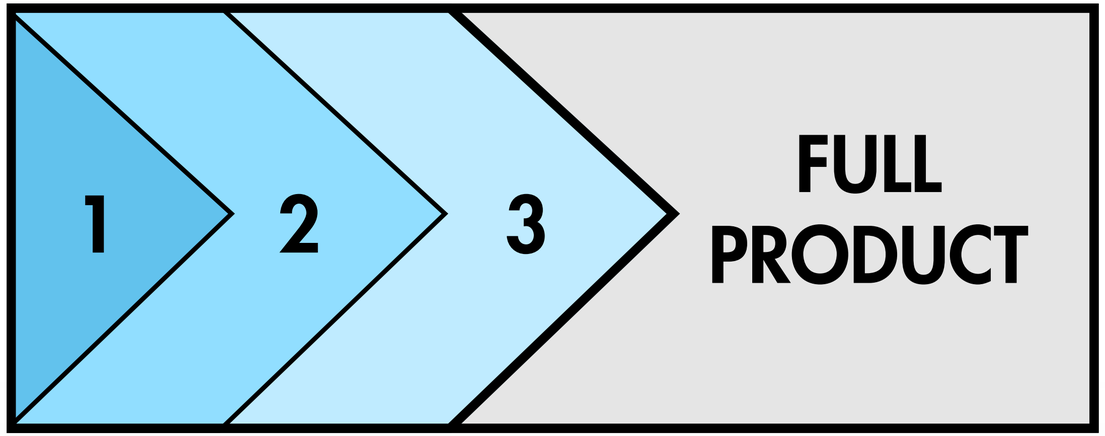
@kryshiggins

# Pattern: Wizard

A series of steps in which users build their experience



HAVENLY

SIGN IN

4 OF 5

YOUR TASTES

When it comes to color in my home, I prefer...

CLEAN & NEUTRAL

SOME COLOR

BOLDER & BRIGHTER

BACK

NEXT

Personal focus

Screenshot © 2016 Havenly, used with permission

@kryshiggins

HAVENLY

SIGN IN

5 OF 5

YOUR TASTES

Some of my favorite stores include:

ANTHROPOLOGIE | ARHAUS | BALLARD DESIGNS | CB2 | Crate&Barrel | DESIGN WITHIN REACH

HORCHOW | IKEA | JONATHAN ADLER | LULU & GEORGIA | POTTERY BARN | RESTORATION HARDWARE

Room&Board | SERENA & LILY | URBAN OUTFITTERS | west elm | COST PLUS WORLD MARKET Unique, authentic and always affordable. | Z GALLERIE

*We have hundreds of stores for you to choose from, these are just some of them*

BACK NEXT

OR

I don't like any of these stores

Personal focus

Screenshot © 2016 Havenly, used with permission

@kryshiggins

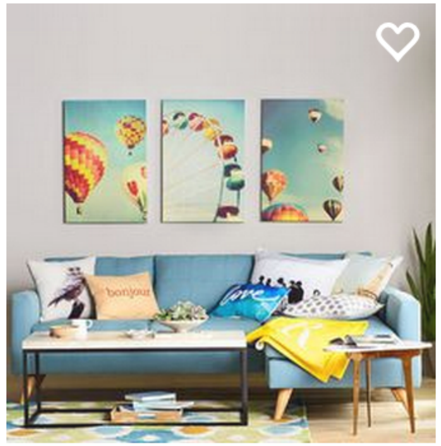
HAVENLY

SIGN IN

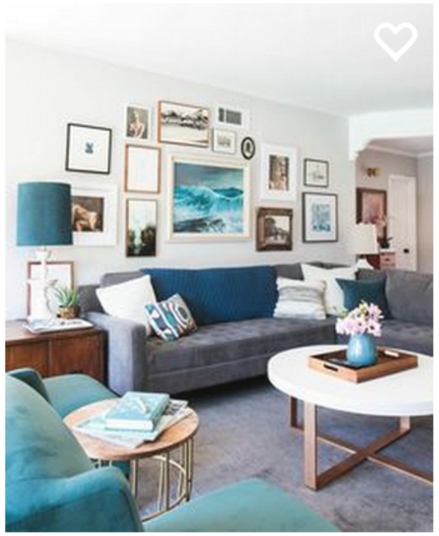
ROOM INSPIRATION

Select at least 3 images to give us a sense of your style.

Don't worry, you can add a pinterest board or other inspiration images later.



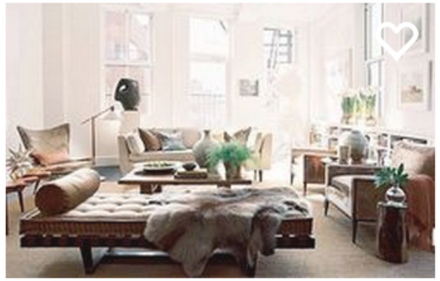
ZOOM



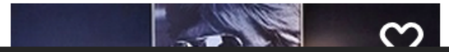
ZOOM

ZOOM

ZOOM



ZOOM



SELECT 3 OR MORE IMAGES TO SEE YOUR STYLE.

Personal focus

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@kryshiggins

SmoochBot

Hi Krystal, Smoochbot here! I'll help you get started with 💔
To begin, I have some quick questions to ask to help me streamline your setup. In a few minutes you'll have your new Smooch account up and running!
Are you working on a personal project or something for your business?

Personal

Business

Type a message...

Send

Personal focus

Screenshots ©2016 Smooch.io, used with permission

@kryshiggins

Designer

Smoochbot

Sweet! ❤️

How many people do you interact with per month?
Include both in-person and online.

- Under 10,000
- 10,000 to 100,000
- 100,000 to 1 million
- 1 million to 10 million
- Over 10 million

100,000 to 1 million

Smoochbot

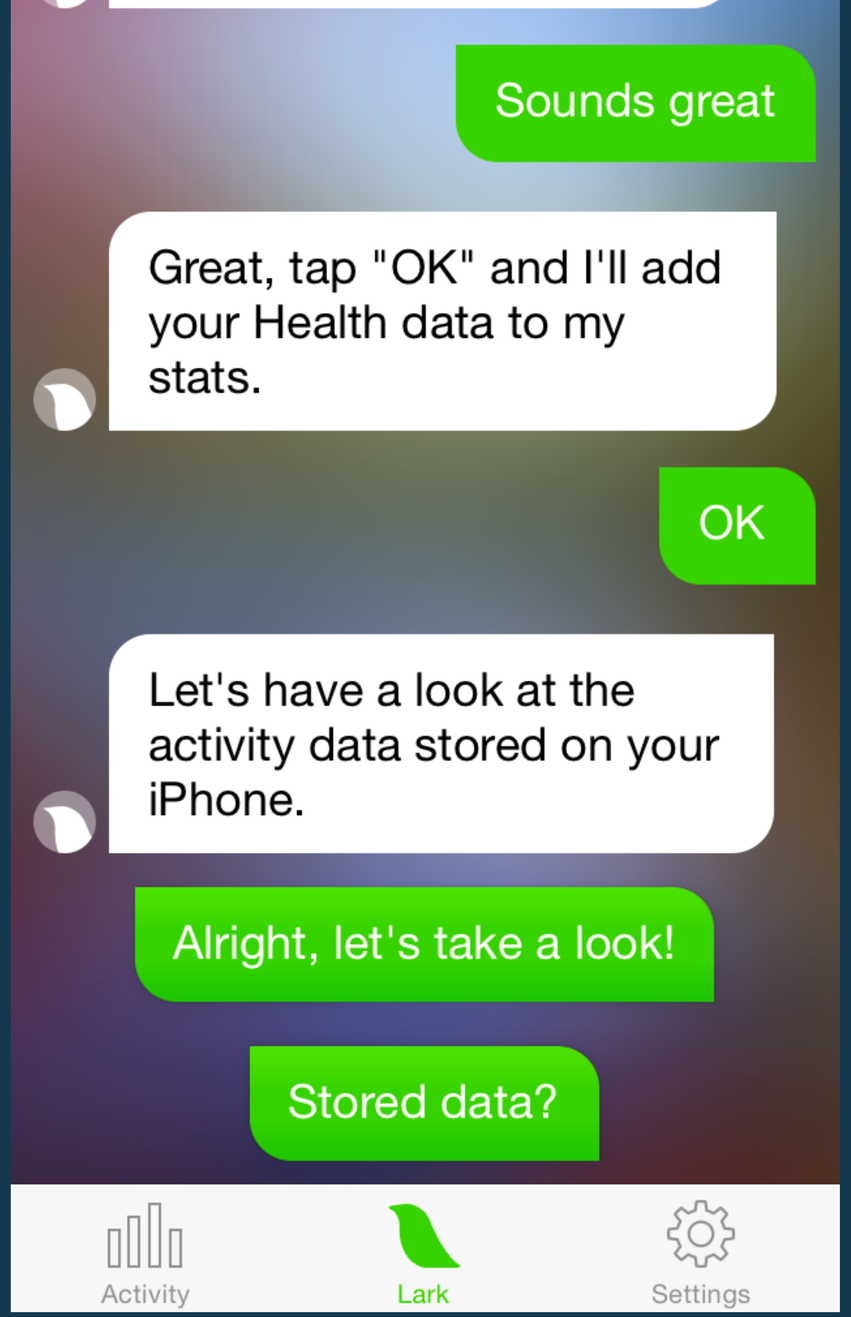
Thanks for helping me get to know you!
I'll work my magic and create your first app.
🤖 Beep boop beep...

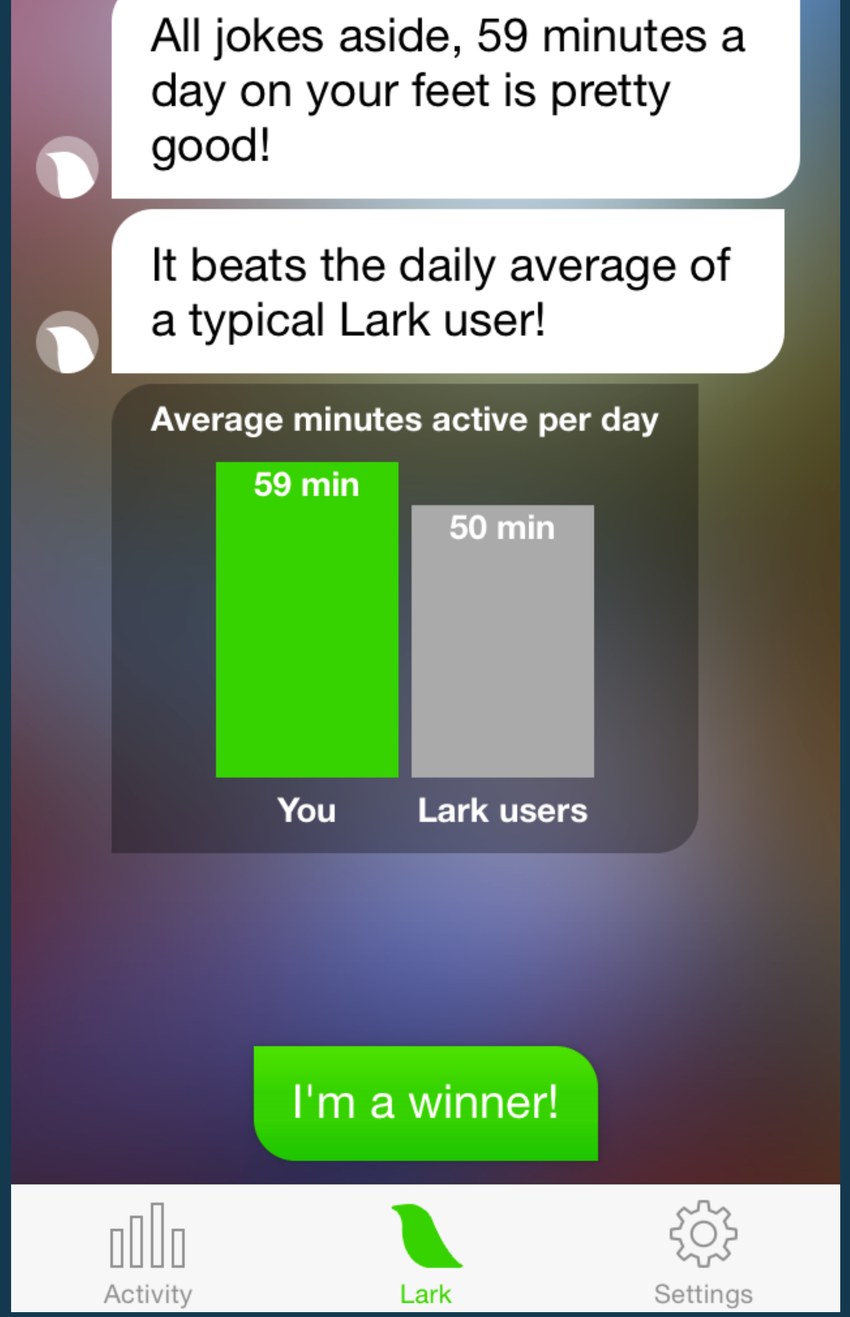
All done!
✅ *Smooch App Created: New user onboarding test*

Send



Screenshots ©2016 Smooch.io, used with permission



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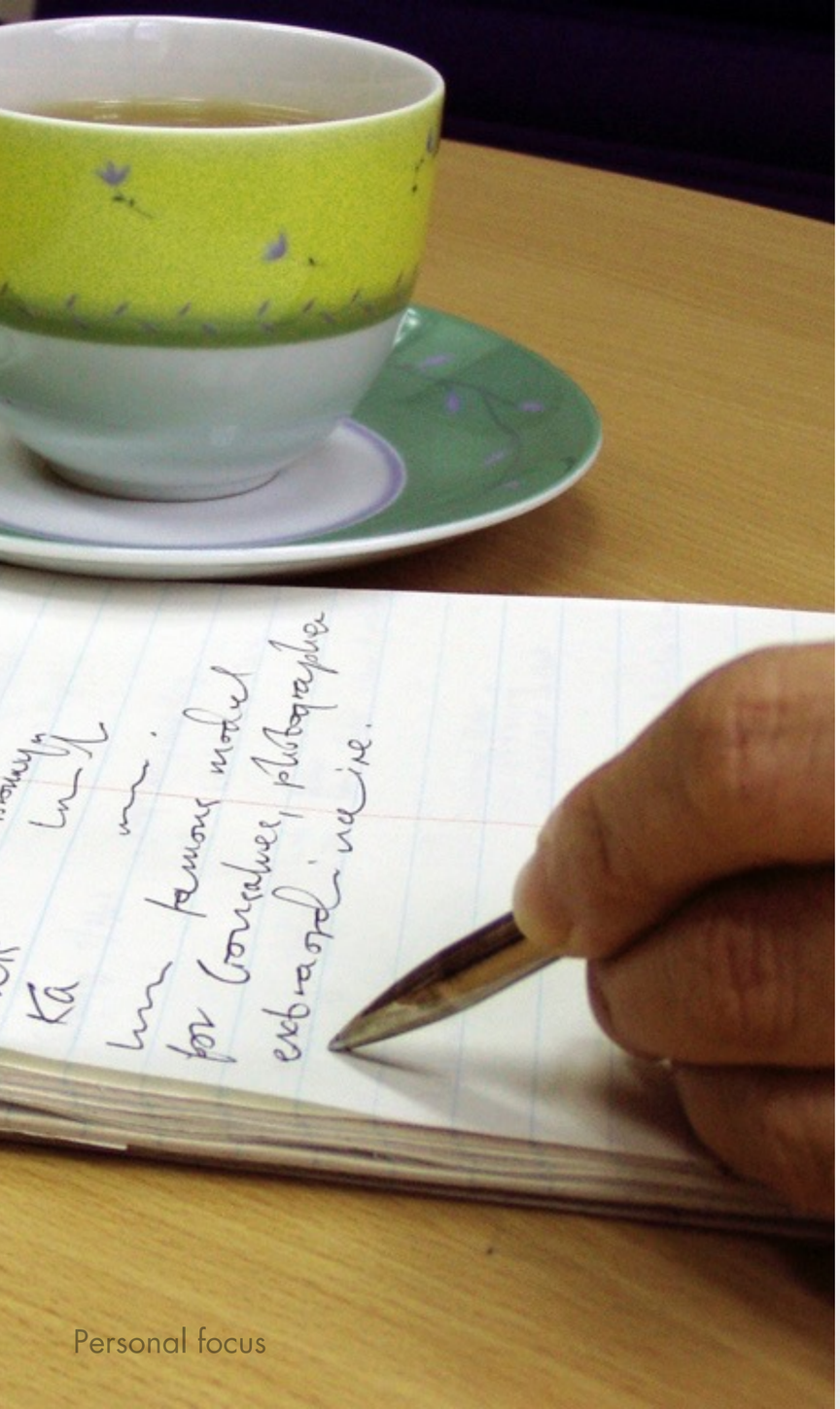
- Questions
- Filters
- Wizard

- **Location**
  Rough (IP) or exact (HTML5 geo API)
- **Time**
  Relative to events, holidays, daily routines
- **Referrer**
  Keywords, other sites, promos, friends
- **Device**
  Display, OS, browser, other capabilities



Take-home exercise

# What's your first question?

**If we knew**

[city, music tastes, etc]

**we could**

[do meaningful thing]

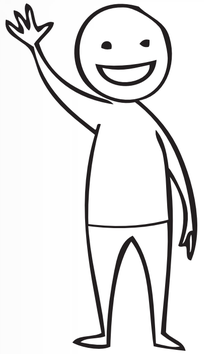
**If we knew**

what vehicle they drive

**we could**

show auto parts that fit

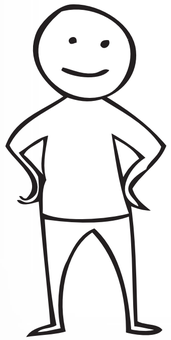
YOUR SITE



What do you drive?

Save your vehicle?

YOUR USER



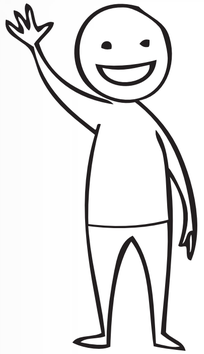
**Edmund**

2014 Nissan Leaf

Save

Browses Nissan Leaf parts

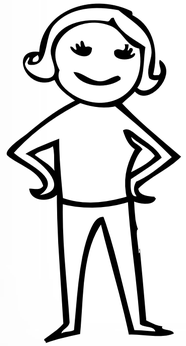
YOUR SITE



What do you drive?

Save your vehicle?

YOUR USER



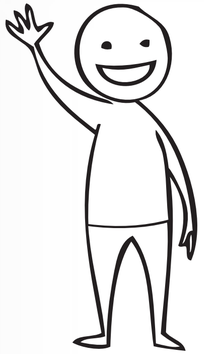
**Mona**

**Motorcycle**

Save

Browse **Motorcycle** parts

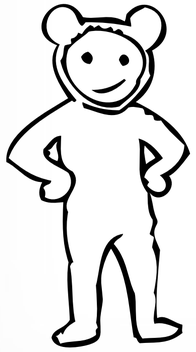
YOUR SITE



What do you drive?

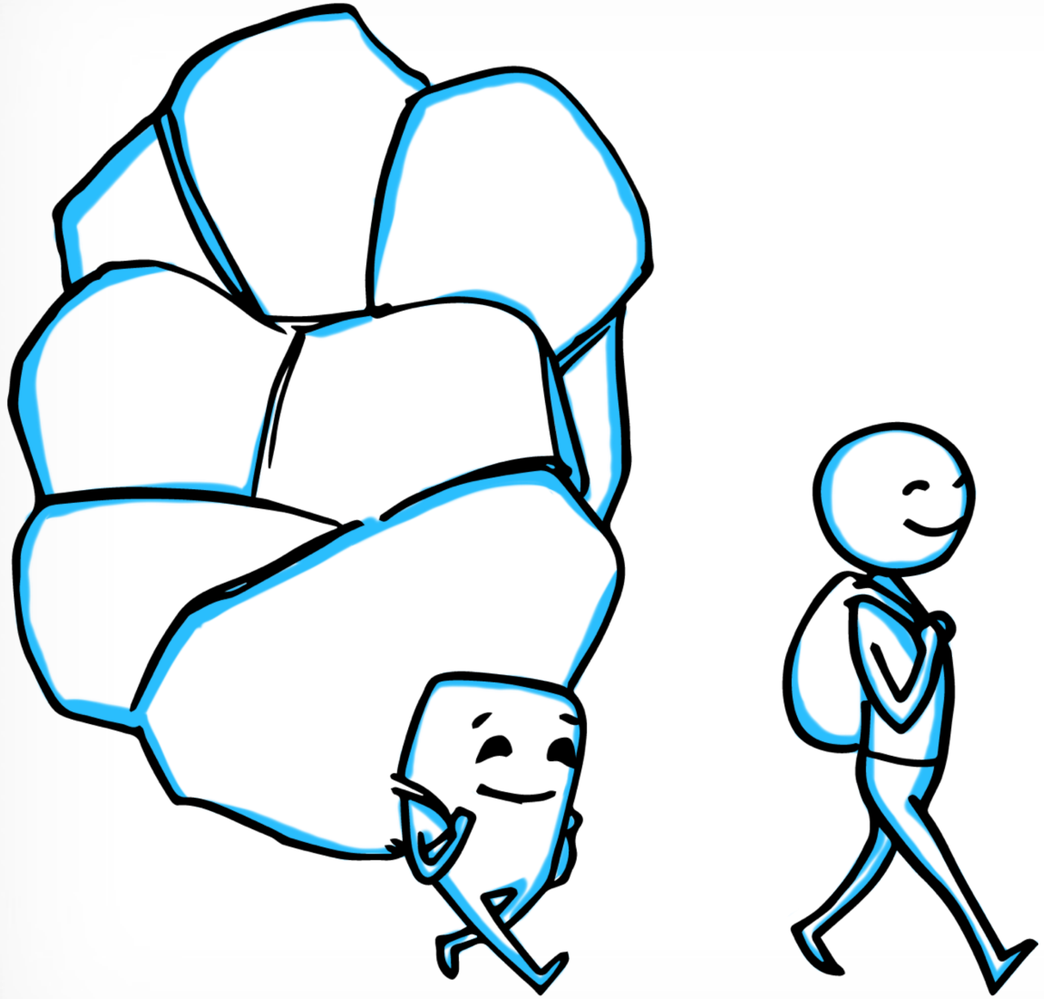
**Show new vehicles**

YOUR USER



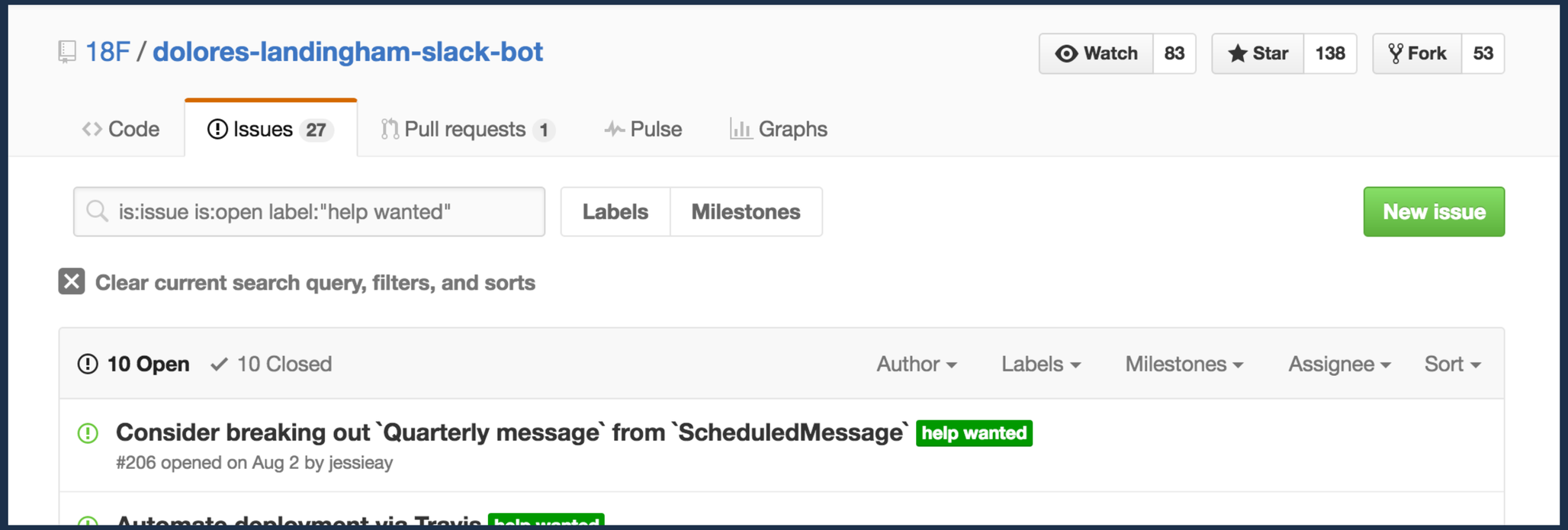
**Tim**

**I don’t have a vehicle**



# Offload the rest

# 18F/dolores-landingham-slack-bot

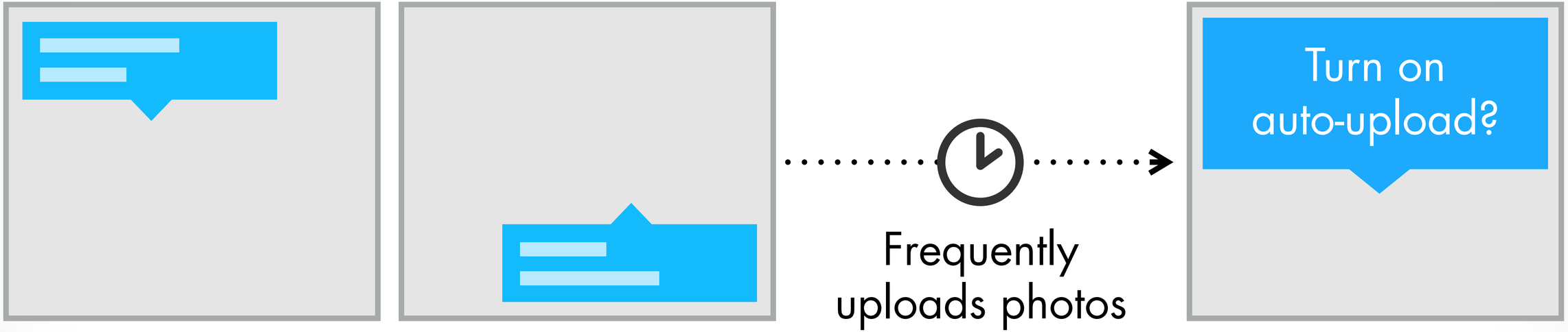




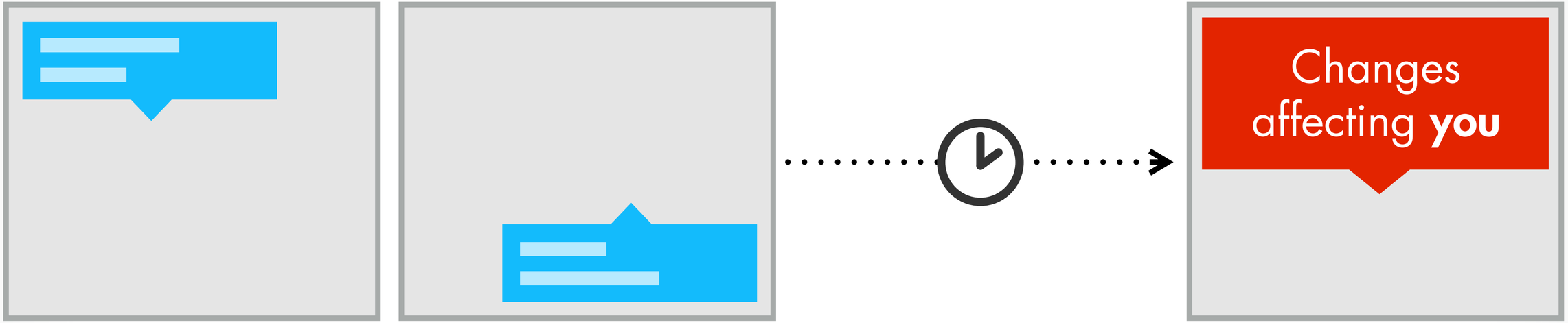

Screenshot © 2016 18F

# Keep leveraging that personal focus…

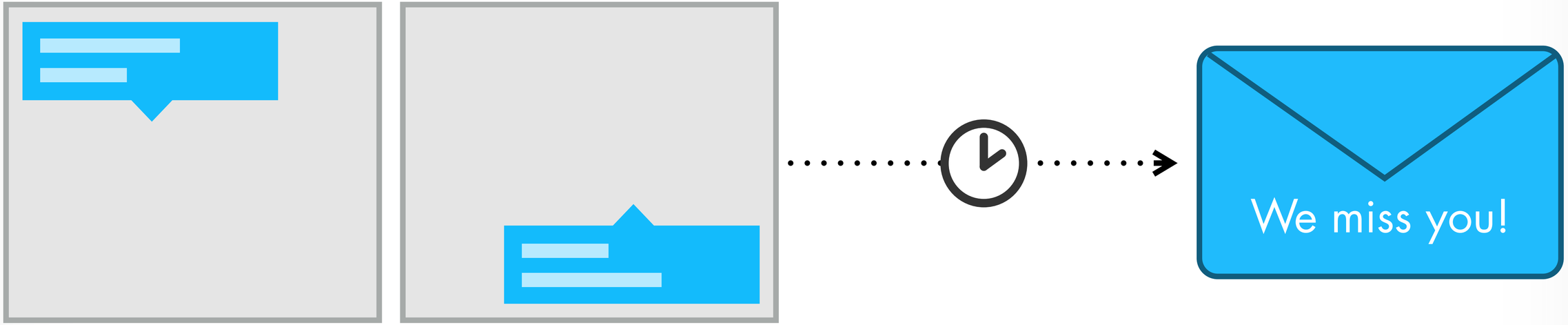
# Point out shortcuts



# Communicate change



# Reach lapsing users



# …to create a
# platform for continued engagement

# Onboard *any* users with:

1. Guided interaction
2. Free samples
3. Personal focus

~~Show~~ **Interact,**
**don’t tell**

# Thanks!

slides.aneventapart.com/orlando-2016

KRYSTAL HIGGINS
@kryshiggins #firsttimeux