

SaaS Platform Onboarding

We needed to onboard users onto our new compliance platform

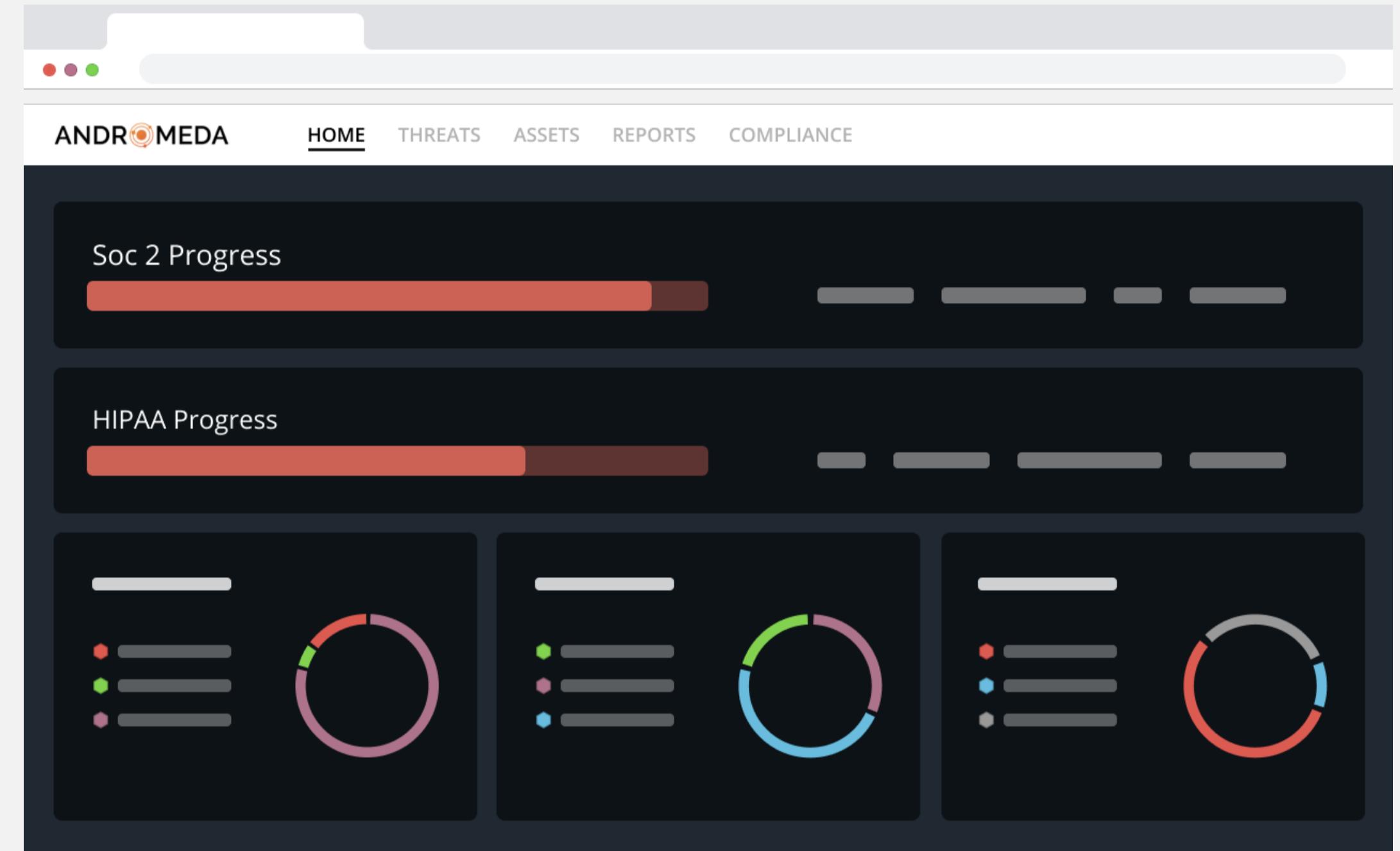
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Research Overview

Scope, goals, and context

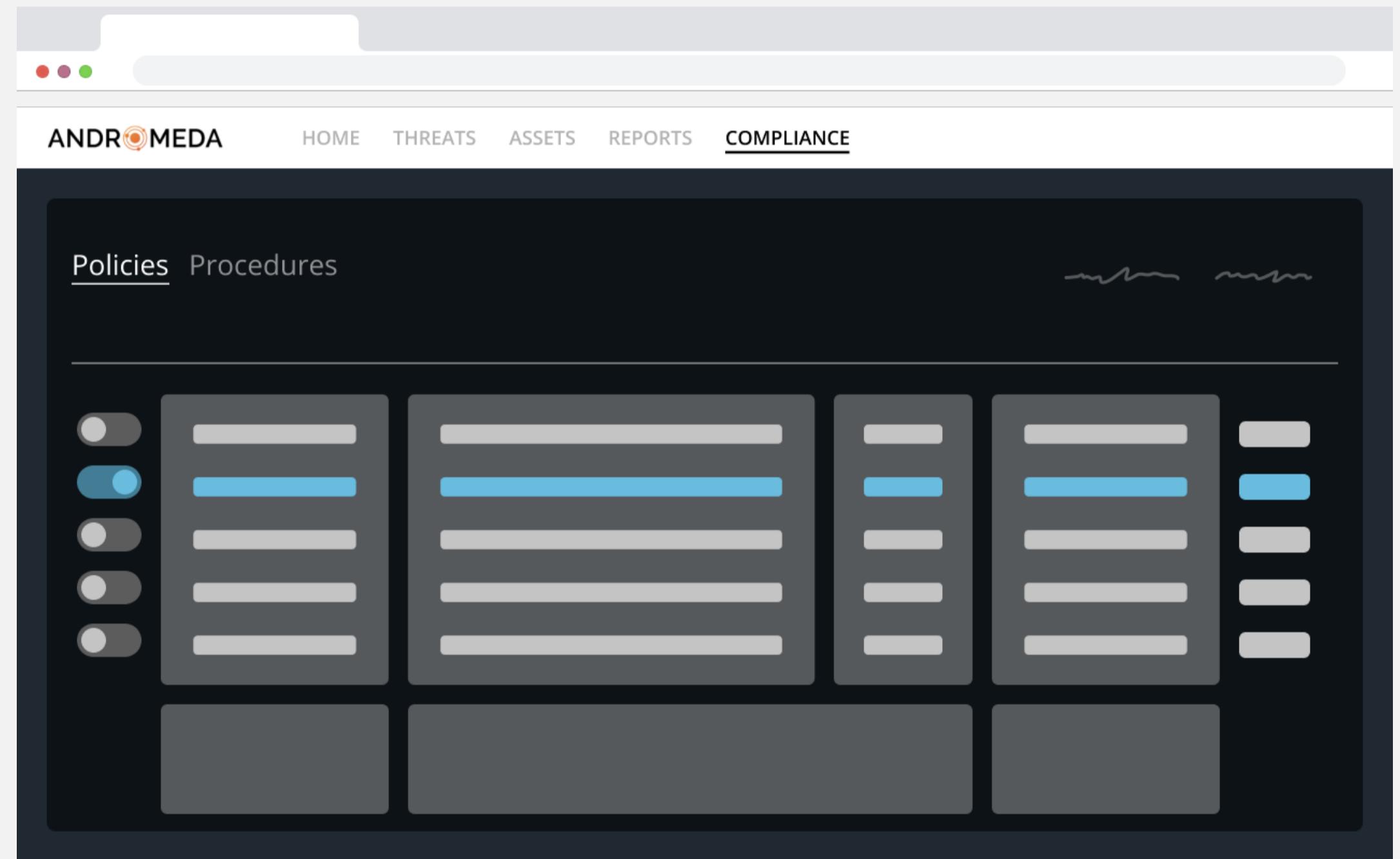
What's Going On?

- We are a **cybersecurity company** that had just launched our new **compliance automation platform**
- As a small, rapidly growing company we were **struggling with the amount of time it took to onboard new customers** and the amount of help they required to fully use our software.



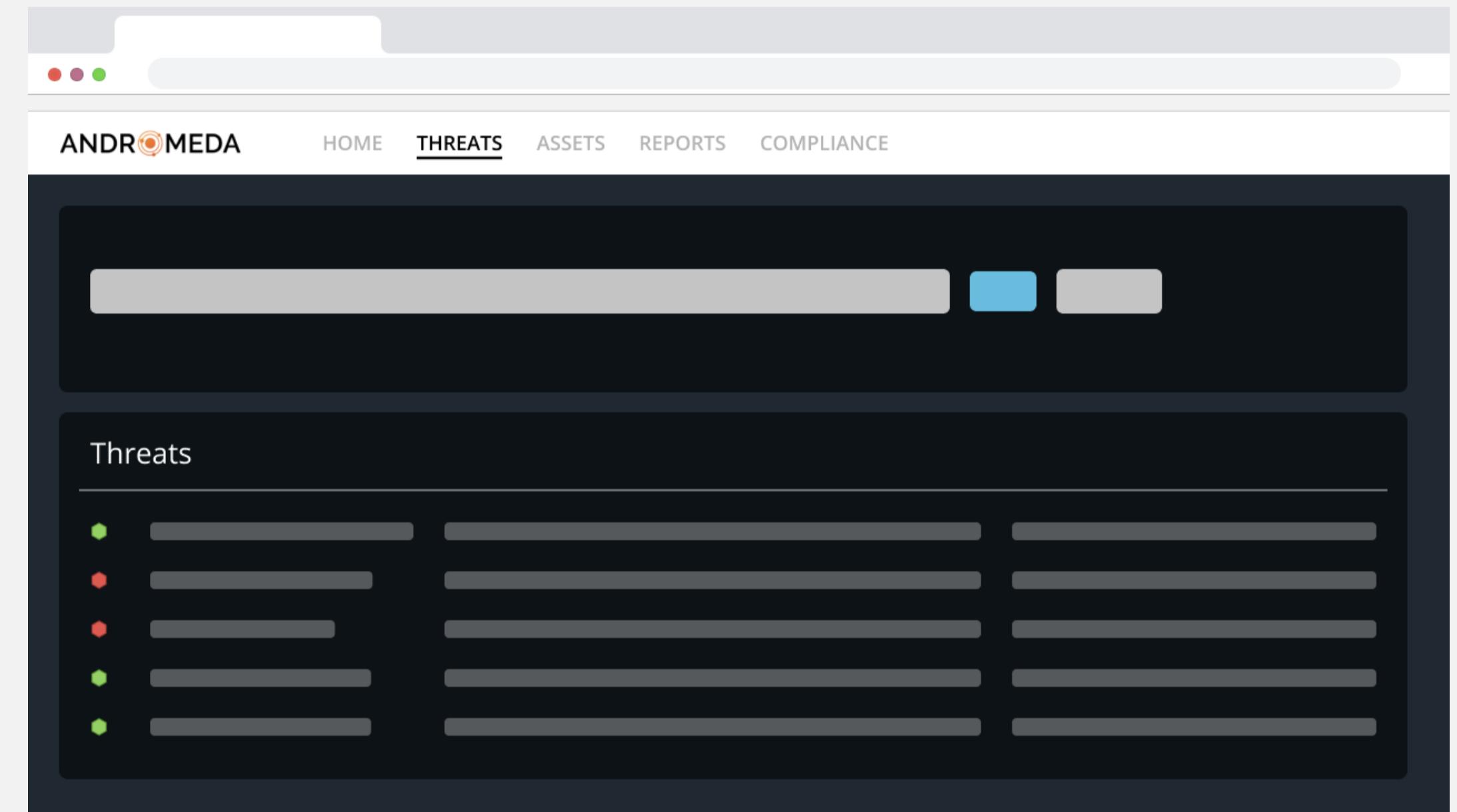
Goals

- Determine **what Issues were causing users to need the most help**
- Suggest some ways to solve those problems that **could be delivered automatically** without the intervention of customer support



Our Users

- Our primary users are **CISO's** (Chief Information Security Officer's) and **CC's** (Compliance Coordinators) who assign tasks to other individuals within their organization
- We target mostly small companies (5 - 30 employees), so **our users make the purchasing decisions.**

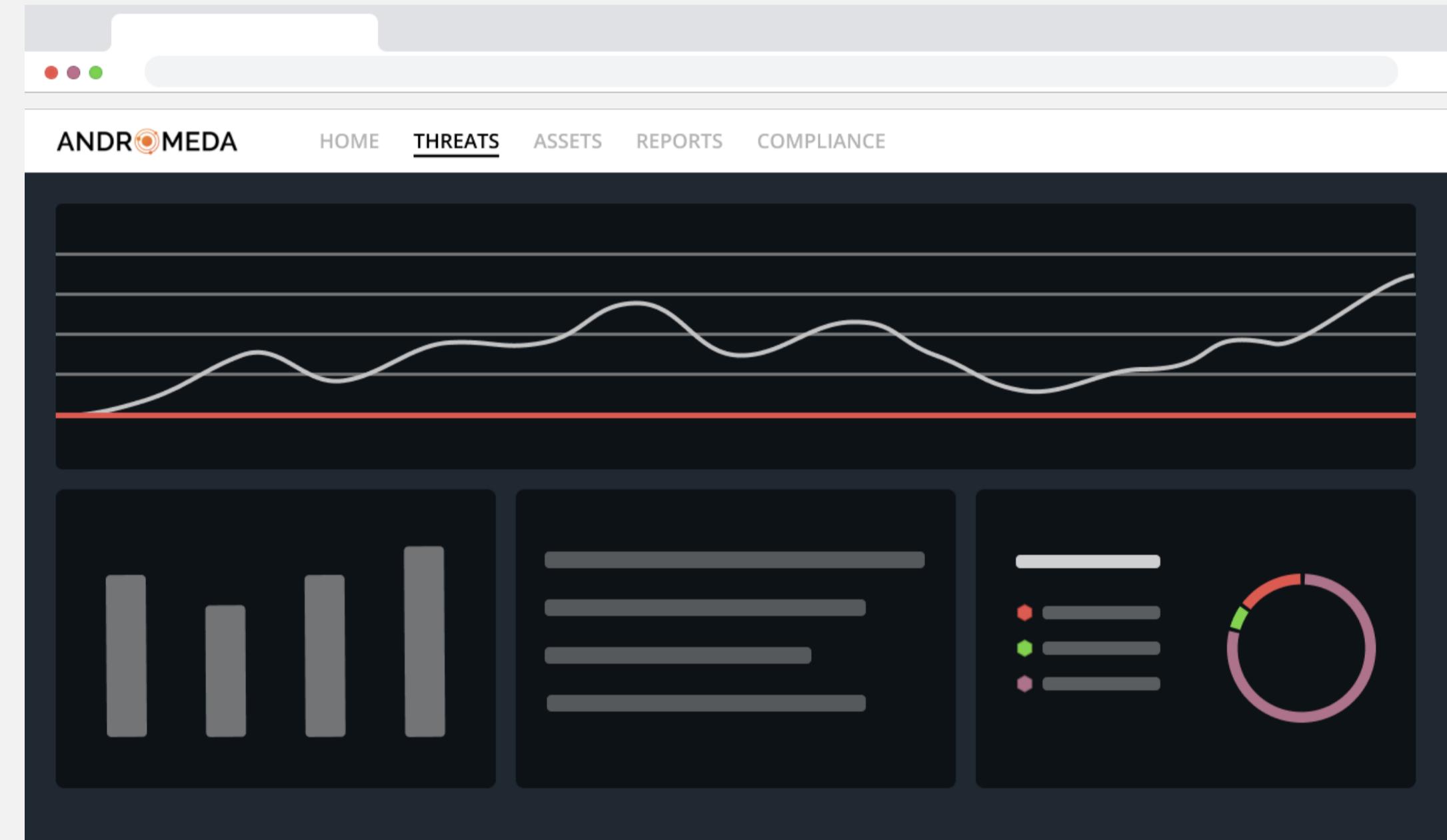


Project Overview

We decided to **conduct a survey to suss out user painpoints** and ensure followup interviews would be as efficient as possible.

Perform a **literature review** of onboarding so we could **develop a general framework of best practices in software onboarding**

Finally, we could use this info in **open ended 1 on 1 interviews** that would allow us to differentiate and segment our users



Survey Methodology

What are we looking for

Survey Methodology (n=28)

- We were interested in **what issues they struggled with the most**
- We were **concerned that they might have felt uncomfortable admitting a lack of understanding** for two reasons:
 - a. These were cybersecurity professionals using a cybersecurity product
 - b. They had already paid tens of thousands of dollars for said product

Survey Findings

What we asked and what they said

Survey Results



What part of the audit process did you find most frustrating?

28

...

RESPONSES

MULTIPLE CHOICE

Select as many as apply

Understanding how it all fit together 63%

12 %

Copy/Pasting information 42%

8 %

Having to manually import data 21%

4 %

Not having the right integrations 21%

4 %

Other 0%

Display all responses > 0 %

Survey Results



How difficult would it be to teach yourself how to use Andromeda in a couple of weeks?

OPINION SCALE

17

RESPONSES

2.4

AVERAGE

...

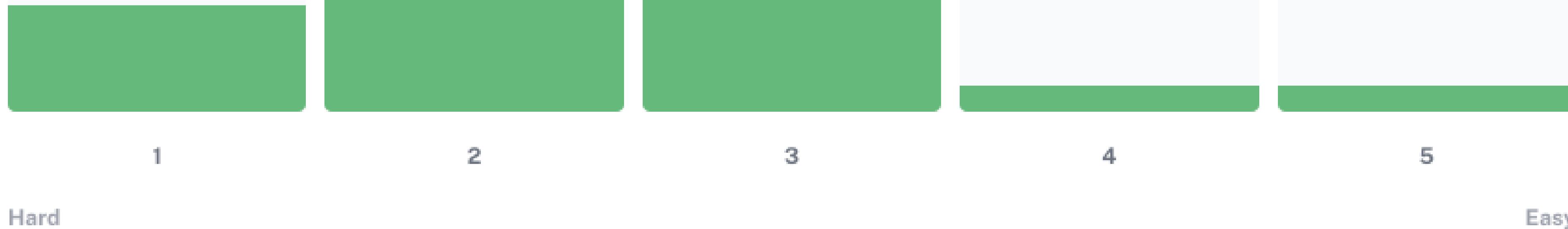
24%
4 ♂

29%
5 ♂

35%
6 ♂

6%
1 ♂

6%
1 ♂



Survey Results

We also Asked...

- How much more time did your last audit take than what you expected?

mean = 8 hrs./week

- How significant a part of your job is compliance related issues?

mean = 1/5 on a 1 - 5 scale

Not comfortable with compliance

Survey Learnings

- Our users **struggled to have a holistic understanding of the product** despite extensive documentation and even after going through an entire audit (a 1 - 3 month process)
- They had difficulty figuring out how to use new features, and never learned the old ones to begin with
- Very few people felt comfortable saying they'd be able to teach themselves how to use the platform. **32% of respondents didn't even answer the question**, which could imply discomfort
- Neither we nor our customers were accurately estimating the level of familiarity they had with the compliance process. While they were cybersecurity professionals, **79% of them significantly underestimated the time it would take to complete an audit**
- Compliance was, on average, **only 20% of their jobs.**

Literature Review

What does the research say about onboarding?

Literature Review

Good onboarding...

- 10 sources
 - Published **2018 and onward**
 - **Qualitative and quantitative** studies
- 1. Has structure. **It explicitly tells people where to go and what to do**
 - 2. Delivers **information in small pieces**
 - 3. Has **as much interaction as possible**

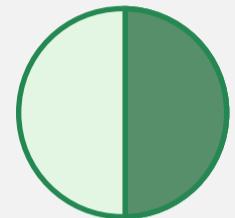
Partial Appendix

Confidence level

- ***User Experience Evaluation Methodology in the Onboarding Process: Snapchat Case Study***

Kate Kapusy, Emma Lógó / Ergonomics in Design / Sept. 30th, 2020

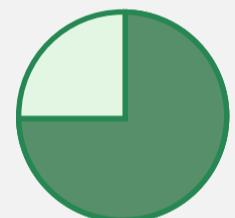
doi: 10.1177/1064804620962270



- ***Investigating the Effectiveness of User Onboarding Solutions With Eye Tracking: A CaseStudy on Paint 3D***

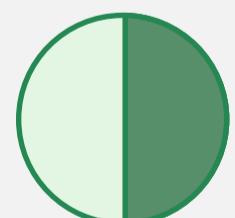
Mária Megyeri, Bálint Szabó / Ergonomics in Design / June 28th, 2021

doi: 10.1177/10648046211026028



- ***Evaluation of a Structured Onboarding Process and Tool for Faculty Members in a School of Pharmacy***

Bethany Baker, Joseph T. DiPiro / American Journal of Pharmaceutical Education / Aug. 2019 / doi: 10.5688/ajpe7100



Interview Methodology

What are we looking for?

Interview Methodology

- Open ended interviews to **see what set our users apart** from other kinds of software users
- **What unique concerns** they might have.
- Our participants (**n=5**) were existing customers we had established relationships with, which we hoped would make it easier to have a freewheeling conversation.

We suspected that **asking about onboarding directly would not work**, most of them would likely not remember frustrations from many months ago. Instead we asked about more general concerns like:

1. What did you spend the most time on during your audit?
2. Was there anything that surprised you about the process?
3. Did the navigation and organization of the information feel intuitive or were things not exactly where you expected them to be?

Interview Results

What we learned and what happened after

“...If you can give me partial data/partial results and fast onboarding that will get people excited.”

User #1

**...There was a lot of text to edit and you could use a better
wizard..."**

User#2

“...If you gave me documentation I would not read it. If a video is longer than 3 or 4 minutes people will lose patience.”

User #3

“...I want to understand holistically why to pick certain controls and not others.”

User #4

“...Give me a guided tour of what works and what doesn’t.”

User #5

Interview Results Summary

- (4/5) Complained about **not being able to onboard themselves effectively**
- (3/5) Mentioned that **documentation was too lengthy** and/or impenetrable
- (3/5) Said they were **overwhelmed by the integrations and structure** of the workflow

We were failing to adequately convey to our users what they needed to be doing.

Even with all the necessary steps laid out, they weren't able to understand either what they should be doing, or how to do it.

We had to refocus not just the ease with which to set up automation, **but make sure to explain everything that's happening automatically**. If users were never able to fully integrate their systems with ours or map their business problems to our features, it would never matter how intelligent our AI actually was.

“The main thing you need to know about instructions is that nobody reads the instructions”.

-Don Norman

Suggested Changes

What we learned and what happened after

Recommendations

- We decided to do a complete revamp of that way that help information was being conveyed to the user by **not relying on our help section for onboarding at all**
- Previously it had been documentation consisting of large PDF's, which we decided to keep as purely supplementary material.
- It was replaced by **popups located in the relevant sections of the page** in an interactive onboarding system that naturally explained the features of each part of the platform.
- This stepwise onboarding process **walks users through the primary sections and potentially confusing components of each feature**, while keeping them informed about the number of remaining steps.

Example Feature - Tasks Page

The screenshot shows a dark-themed web application interface for managing assigned tasks. At the top, there is a navigation bar with links for HOME, THREATS, ASSETS, REPORTS, and TASKS. On the left, a sidebar displays 'Compliance / Assigned Tasks' with a sub-note: 'The Assigned Tasks page is where you can view all the tasks that have already been assigned to other users.' Below the sidebar, there are search bars for 'Task Name' and 'Assignee', and a dropdown for 'Choose Task order...'. On the right, there are buttons for 'Add Item', 'Export', and 'Import'.

Task Name	Task Description	Priority	Task Assignee	Due Date
Example Task 1	A description of the task	Low	Status: Assigned to Graham Smith Re-assign JAN 1, 2021 3:15pm PST Cancel	
Example Task 2	A description of the task	Medium	Status: Assigned to Graham Smith Re-assign JAN 1, 2021 3:15pm PST Cancel	
Example Task 3	A description of the task	High	Status: Assigned to Graham Smith Re-assign JAN 1, 2021 3:15pm PST Cancel	
Example Task 4	This is what you see if you have a longer description. <i>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.</i> <i>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.</i>		Status: Assigned to Graham Smith Re-assign JAN 1, 2021 3:15pm PST Cancel	
Target	(Control, Policy or asset name, whatever part of our product that generated this alert or that will lead you to the solution)			
Date Assigned	JAN 1, 2021 3:15pm PST			
Status	Choose Status			
Notes	How is this task going?			

Example Feature - Tasks Page

The screenshot shows a dark-themed web application interface for managing tasks. At the top, there is a navigation bar with links for HOME, THREATS, ASSETS, REPORTS, and TASKS. Below the navigation is a breadcrumb trail showing 'Compliance / Assigned Tasks'. On the right side of the header are buttons for 'Add Item', 'Export', and 'Import'. The main content area displays a table of assigned tasks. The columns are Task Name, Task Description, Priority, Task Assignee, Due Date, and Status. There are four tasks listed:

Task Name	Task Description	Priority	Task Assignee	Due Date	Status
Example Task 1	A description of the task	Low	Status: Assigned to Graham Smith	JAN 1, 2021 3:15pm PST	Re-assign Cancel
Example Task 2	A description of the task	Medium	Status: Assigned to Graham Smith	JAN 1, 2021 3:15pm PST	Re-assign Cancel
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Below the table, there is a section for a specific task:

Target: (Control, Policy or asset name, whatever part of our product that generated this alert or that will lead you to the solution)

Date Assigned: JAN 1, 2021 | 3:15pm PST

Status: [Choose Status](#)

Notes: How is this task?

A callout bubble points to the 'Choose Status' button with the following text: "Users can set the status of tasks after they've been assigned to them, which will automatically trigger followup tasks and ensure that the task has been completely documented."

At the bottom of the page, there are navigation links: < Previous, 2/3, and Next >, along with a search bar and a help icon.

Results, Closing Thoughts

...and what comes next

New Onboarding Metrics

- Over the subsequent two weeks after we finished implementing the new onboarding **5 new customers were onboarded**, resulting in...
 - The **number of meetings** required to onboard a new customer **dropping on average by 33%** (from 3 to 2)
 - The **length of those meetings dropping by 36%** (from 64 minutes to 41 minutes). 0

B2B Vs. B2C In Early Stage Startups

- While these insights work in the short term, it's very likely that they will need to reevaluated shortly
- The users surveyed/interviewed here are **probably not at all typical of the larger organizations** we are intending to expand our market into.
- B2B users often have a very high degree of uniformity in their professional roles and a **greater familiarity with the industry** is likely. However, It's probably that what's currently being done by a single person **will expand into teams**.
- **In this study we skipped the creation of personas**, but that will not be possible in the future. The needs, goals, and pain points of the differing individuals will need to be understood to design good instructions

Thanks for coming

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