Farewell Kera

18 APRIL 2013
MAX CAMERON

EDIT: We've had a number of inquiries about licensing Kera's technology. Please email max at kera dot io if you're interested.

It's always difficult to share bad news, but the best way to undertake that difficult task is to do it quickly.

One month from today, we'll be shutting down the servers for both Version 1 (interactive walkthroughs) and Version 2 (The Get Started Widget). This should give all of our existing customers enough time to remove Kera from their apps.

I think it's important to explain the reasons we're making this decision:

Kera is deeply integrated into other applications, and we found ourselves dependent on our customers' product development cycles. As a result, we couldn't collect data or feedback fast enough to make progress.

If Kera had delivered enough value, we could have overcame those problems and our customers would have gone through the pain of integration. However as it turns out, the Get Started Widget didn't deliver enough value for serious commitment.

And lastly, we took a step back and looked at what we would have to build to deliver enough value to overcome those obstacles. And we just couldn't deliver those features with the resources available to us.

TO OUR TEAM

I want to thank the team that joined us in this journey. Chris, Joey, Taige and Dave - thank you for everything you did along the way. You are a remarkable team, and we can't wait to see what your next moves are. We couldn't have accomplished what we did without you, and we're sorry that things didn't work out the way we wanted them to.

TO OUR CUSTOMERS

To our customers who used our barebones products, who invested time and resources into integration, who spent hours giving us feedback and helping us make the product better, I want to say thank you. You are truly visionary customers, and I only hope that you continue to give new companies a chance when they're trying to solve a pain point you have.

SO WHAT'S NEXT?

Kera's founding team isn't ready to pack it in just yet. In fact, we've reflected on everything we've learned over the past 9 months, and we're hard at work cooking something special for you all to enjoy.

Find me on twitter if you want to stay up to date on what we're working on.

Thanks,

Max and the Kera team

How to Conduct a Usability Study: A Complete Recipe & Checklist

9 APRIL 2013

TAIGE ZHANG

I've conducted several usability tests for different web applications but it's still time consuming to plan and I always feel like I'm forgetting something. Many people know the importance of doing usability studies but not so many are able to do it well.

Similar to me, many developers, designers, and product managers fell into this UX role and had to learn it themselves. It's taken me a while to learn how to conduct effective, valuable user testing so I thought I'd write a guide and checklist for those who don't do this as their full-time job or just starting out.

BASIC IDEA OF USABILITY STUDY

If something isn't performing well, you have to go be a detective and figure out why. That's the essence of doing user testing.

This is something I really enjoy doing because as a product owner, you always want to build the best product possible and there's nothing like watching real people use your product. For my maps business, I literally stood in the retail stores and watched how people responded to the product: if they noticed the product, how they responded to it, how they decided whether or not to buy, why they bought it, etc. It's like being a modern-day Sherlock Holmes but less dangerous.

Recently, I performed a usability test for our latest product, the Get Started Widget and will use examples from it.

REASONS TO DO A USABILITY TEST

The main benefits of doing web usability testing are

- You get unfiltered and high bandwidth feedback
- You can see how users think and points of confusion
- You get to figure out the why
- You feel like Sherlock Holmes

Usability testing is a qualitative method of research which is much better suited for answering question about why or how to fix a problem. Quantitative methods such as A/B testing do a much better job answering how many and how much questions. Nielsen Norman Group has a great article on which user experience research methods to use.

Aside: If your company has a support team, the team lead should be involved with user experience in general because those people really understand the pain of the customer and can often provide ideas and suggestions to vastly improve the product.

For example, at Wimdu we were missing out on signups because of our Facebook Connect design. We didn't know this but we confused some users into thinking we required Facebook in order to sign up. People actually called in to try to figure out how to sign up without Facebook. We fixed this with by adding a horizontal rule with the word "or" between the sign up methods. That ceased those types of support calls.

STEP 1. PLANNING (1-3 HOURS)

Have an objective(s). Why are you doing this study? What questions do you want answered?

> Kera Example
> Study Objective 1: Do people know what what they're signing up for?
> Study Objective 2: Why are people not embedding?
> Study Objective 3: How easy is it for users to use our application?

Decide on goals for the user to accomplish. What would success look like?

Kera Example
Goal: User creates a mission and embeds widget on his or her site.

Have hypotheses (optional). Although it is recommend to have one, I have often been really successful without one especially early on. Sometimes product challenges are so difficult, you need to do research just to get a hunch. In this case, keep an open mind and just watch users and take in what is happening without any bias to prove or disprove.

Alternatively, you may want to conduct a heuristic evaluation, a review by a usability expert of your UI against accepted heuristics, to generate some hypotheses. This can also help you create appropriate tests and prototypes for the next step. See also: Tips on doing it yourself and a primer.

Kera Example
Hypothesis 1: People don't understand how to use the application.
Hypothesis 2: It's not friendly to marketers.

Choose a location. This should be as close to the environment of the actual user as possible.

Kera Example
Location: Office environment, on users' own computers.

Make a list of questions you want to ask. These include interview questions you might want to ask, prompts for follow-up questions, as well as post-experiment questions that you want to ask each participant.

Screening Questions:
What's age? What do you do? Have you ever embedded a YouTube video?

Experiment Questions:
Did you understand you'd be getting a widget for your website?
What do you think we do?
How would you describe us to your friends?

You can also try to understand what is going through the user's head by asking them questions as they are using the application. See "asking question to get the why" in Step 3.

A usability test plan template. Here's a template that can help you plan your study.

STEP 2. SETTING UP THE STUDY. (1-6 HOURS)

Get the prototype or test environment ready. Create and ready the materials you need for the study. For example, do you need build anything, create mockups, set up a test or local environment, disable A/B testing, etc.?

You may want to pilot test the study to help you identify gaps in your experiment or test setup.

Prepare a way to record the study. Recording the user is best because you may want to reference it again if you missed anything and it allows you to administer the test better since you're not focused on taking notes. (And I'm pretty sure all good spies use recording equipment.) If you're not recording, figure out how to take good notes. If you're collecting quantitive data, prepare a form or table to help you quickly take notes and stay organised.

Get the people. Ideally you'll have a pool of candidates to ask to come in for a usability study. I suggest putting up posters offering cash for participation around offices, incubators, and universities. And online on craigslist, etc.

If you don't have a pool to select from, you can try finding participants on the spot at cafes, offices, universities, meetup groups, and hallways.

You should pick a few types of people for your user groups because it's interesting to see how different groups respond but if you're testing for general usability, random people with normal intelligence are just as effective. I'd recommend 4-8 participants. Since our product is for web users, we wanted to get people who are internet savvy. We put people in 3 groups: business/marketing, engineering, and general.

A usability study checklist. Here's a checklist to help you prepare for conducting a web usability test by Steve Krug's Rocket Surgery Made Easy book.

STEP 3. EXECUTING THE USER RESEARCH STUDY. (1-4 HOURS)

Greeting the participant. You should brief the users in a standardised way that allows you to understand them and helps them give you the best feedback possible. A sample script:

> Kera Example
> Intro to Usability Study:
>
> Have you done a usability study before? (yes/no) Great, just to give you an idea of how this works. We'll be asking you to take a look at our website and asking you some questions. Then we'll get you to try our application to perform some tasks. It should take about 25 minutes in total. We're going to be testing the web application to see if it is understandable and usable. We're not testing you. There are no right or wrong answers.

> Intro to Marketing Site Analysis:
> Say a friend has sent you a link to this site. I'm going to give you a few moments to look at the site and then ask you what it's about. Look around the site as you would normally. This is yours– go ahead. (Open the site/test environment and give them the laptop or mouse/keyboard.)
>
> Intro to Task Completion:
> Now we're going to ask you to use our application. (After finding out participant was a history major). I'm going to give you a scenario. Let's say you're a project manager for a museum's website that has users. You want your users to be more engaged and active so someone has recommended that you take a look at this site. You have developer resources but you're going to take a look first and evaluate it because you're responsible for this project.

I highly recommend watching this short video on how to run in-person experiments on Stanford's HCI course (slides) and this Zipcar usability test example. If the videos are no longer available you can still find them in my shared Usability Toolkit folder on Box below.

Lastly, collect information on the participant and get them to fill out any paperwork if necessary (i.e. contact info, demographic data, consent, NDA, etc.). Many templates are in the Usability Toolkit folder at the end.

Observing and taking notes. Observing the user is one of the main benefits of in-person experiments. Watch users as they attempt to perform tasks with the user interface. Collect quantitive data on task completion. Record interesting findings. Log points of confusion. Steps users took to complete a task or to explore/navigate your website. Note what users were looking at and what they ignored. What users say and ask.

> Kera Example
> Some notes I made:
> - she clicked on 'get started' button because she wanted to get more info; not interested in pricing yet
> - visuals were the main thing she looked at; headlines second; text copy was ignored
> - visuals did not communicate to user what our product was. it was confusing
> - welcome message– user ignored it
> - get started icon– she was not interested in clicking it and didn't know what it was
> - user did not click on it was because didn't know what it was

Asking questions to get the why. There are many questions you can ask during the study to understand why users are doing certain things, why they did something, what mental models they have, and what they were guessing or attempting to do. Some questions I ask are:

> Kera Example
> Can you describe what is happening?
> How would you go about doing [something]? Take a guess.
> What do you want to click on now?
> What do you want to know now?
> Why did you do that?
> What are you thinking?
> What do you think this is? (point to a UI element).
> Is there anything you're confused about or that stands out to you?

People don't always tell Sherlock Holmes the truth. As NN Group explains self-reporting can be skewed because often users tell you what they think you want to hear, what they remember, and rationalise.You should use your judgement on what's really happening based on your observations and use questions as another source in your investigation.

Asking the user to talk aloud. The think aloud protocol is an effective method to understand what is going through a user's mind. It's similar to asking questions to get to why but here the user is talking aloud as he or she is performing the task uninterrupted. You'd need to teach the user how to think aloud first. I usually say something like this:

> As you're doing the task, I want you to say aloud whatever you are thinking. For example, if I am thinking aloud (take a pen), I'd say: I see this pen. It has a blue cap so I assume the ink will be blue. It looks like I can just pull it off so I'll try to pull it. Great, it worked.

Or see 8:25 of the in-person experiment video to see a Stanford professor do it.

Often this is hard for a user so you'd need to revert back to prompting the user or asking questions to get the why. Remember: participants who think aloud will be slower at performing tasks and may behave differently.

Debrief the participant. This is the time when you can 1. inform them about the purpose of study if you couldn't before 2. get them fill out paper survey questionnaires and 3. get them to sign a receipt of remuneration.

STEP 4. SUMMARISING AND PRESENTING FINDINGS. (2-5 HOURS)

Refining notes. Right after each participant, take the time to write down all your observations and particularities while they are still fresh in your mind. Quickly check the notes you made during the study to see if they can be understood later on and convert to long-form if necessary.

Aggregate findings and performing calculations. You'll get an idea of the most critical discoveries which will drive your report. Compile all the qualitative findings into main takeaways, citing numbers or percentages to indicate importance. Do the same with quantitive data.

Perform calculations as need. Here's a website with many useful calculators for usability testing.

Reporting findings. Summarise the goal, participant characteristics, results, and recommendations. The report depends on the scale of the project and your audience. If it's a small study for your startup, it can be relatively informal. If it's for a client, you might need to package your presentation accordingly. Here are some tips.

Presenting. It's great to give a presentation to the team in person so you can be sure you're communicating the findings effectively. You can also take this time to answer questions, discuss the implications, and brainstorm improvements or follow-on studies together.

FINAL THOUGHTS

You might want to outsource this. While I enjoy doing it in-house and being close to users, there are definitely companies that specialise in UX and conduct great usability tests. A couple relatively cheap and easy to use ones are YouEye and usertesting.com

To me, data without reason is just noise. For example, if there is correlation between flu outbreaks and iPhone releases, would you trade on it? Probably not because there is no underlying rationale. There are many dangers to basing decisions on just data such as randomness, data dredging, confounding variables, correlation vs. causation, Simpson's Paradox, false discoveries, etc.

I'd recommend using both A/B testing and usability studies to give you both strong data but also help you uncover the reasons for why things are happening. Usability studies and talking to your users is the best way to confirm or disprove your reasoning.

BOOKS AND OTHER EXCELLENT SOURCES THAT HELPED ME

Checklists for your usability study. Get it here.

Template for planning usability study. Get it here. More templates on usability.gov

Example of an expert conducting a usability study for Zipcar. See it on YouTube.

Example of usability study process for Boxee. Read the article here.

UX Books, classes, people and more.

This is a prerequisite for starting out in user experience. The Design of Everyday Things by Donald A. Norman. Here's a nice review.

This is the most respected web usability guide. Don't Make Me Think: A Common Sense Approach to Web Usability by Steve Krug.

Usability Testing Demystified by Dana Chisnell. She also has several great articles on UX Magazine and her website.

Human-Computer Interaction Course (Stanford + Coursera.org)

Hack Design. An easy to follow design course for hackers who do amazing things.

Handbook of Usability Testing: How to Plan, Design, and Conduct Effective Tests, 2nd Edition (Downloadable sample eBook or on Amazon) by Jeffrey Rubin and Dana Chisnell

Whitney Hess is a UX designer who has really gone out of her way to help aspiring UX designers and people interested in this field like me. Some good ones: So you want to be a user experience designer, You're not a user experience designer if, Whitney Hess's recommend UX resources, and UXers Twitter List.

This is my Usability Toolkit shared folder where I keep a lot of my resources for user experience design. Say hi and get in touch over Twitter if you want to be a collaborator.

TZ's Usability Toolkit

Options

Handbook of Usability Testing
Updated Apr 5, 2013 13

Running In-Person Experiments
Updated Apr 7, 2013 3

Templates & Checklists
Updated Apr 7, 2013 22

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Uploaded Apr 18, 2013 · 30.8 MB

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Taige Zhang is a Product Marketer at Kera. You can follow him on Twitter @taigeair.

TAGS: BEST PRACTICE , UX

TWEET EMAIL

How Angel List Onboards Its Users

8 APRIL 2013

MAX CAMERON

ANGEL LIST

If you're a startup or a SaaS business, chances are you have one of AngelList's 100,000 startup profiles. AngelList describes itself modestly as "…a platform for startups to meet investors and talent," but the network is attempting to fundamentally alter the way that startups meet investors and raise money.

They were able to avoid the chicken and egg problem that plagues so many two-sided marketplaces because an Angel List page is useful even without investors on their site. They solved a logistical problem first - taking the pain out of distributing information about your startup to interested investors.

And once AngelList tipped with startups, it was only a matter of time before investors followed in droves. Because after all, that's what investors do best :)

ANGEL LIST ONBOARDING GOALS

I would bet dollars to doughnuts that Angel List's criteria for activation is the act of publishing a startup profile. But much like Linkedin, simply publishing a profile isn't enough. The key is publishing a complete profile.

So what, specifically, are they looking for, and how do they get users there?

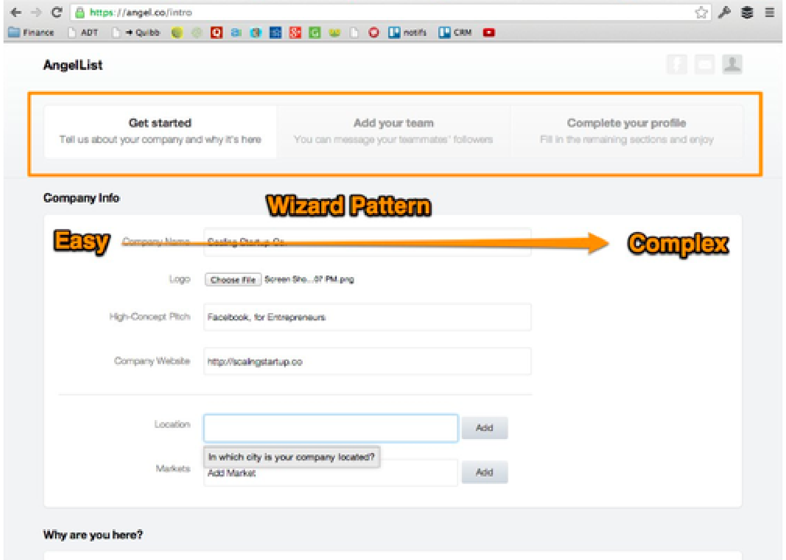
An Angel List profile can be separated into three main sections: Basic information (name, logo, location, etc), adding your team (founders, employees, professional services, advisors, customers, etc), and lastly, the more advanced profile information (financial numbers, deck, product information, press mentions, etc).

Essentially, activating on AngelList means completing a very complex form. And so my gut says the biggest activation challenge isn't learning how to use the software - most likely it's creating the content and having your team agree on it.

ANGEL LIST ONBOARDING CONVENTIONS

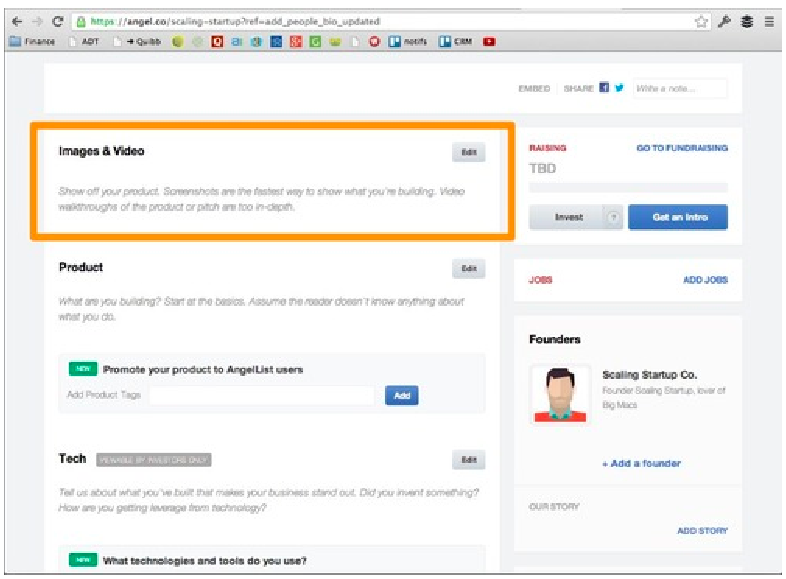
Wizard Pattern

From a UX perspective, Angel List is using the Wizard Pattern to guide users through the onboarding process, starting with the easiest information and moving to the most complex information. The first section of the wizard the basic company info, the second section is the team section, and then they send you to your actual profile to fill in the advanced information.



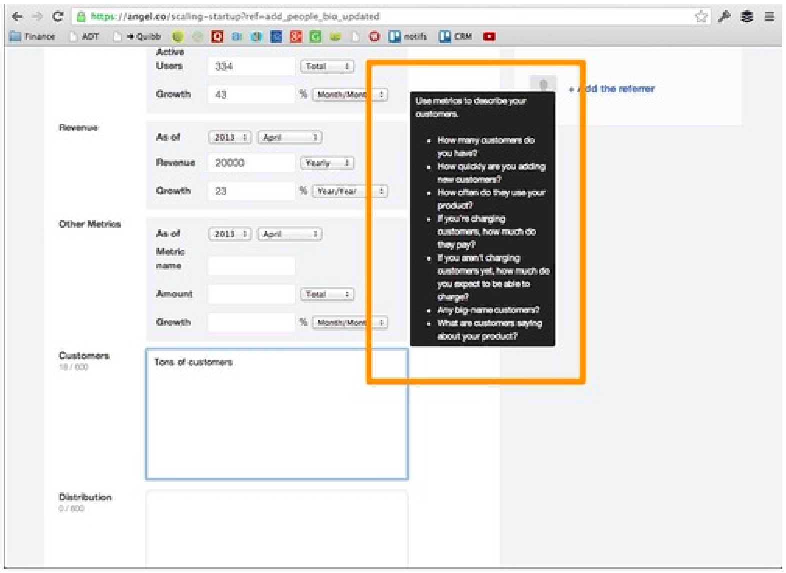
Empty State Micro-Copy

When you're looking at an empty section of your Angel List profile, they show you some micro-copy that gives you hints on what to include. For example, underneath of the Images & Video section, the micro-copy reads, "Show off your product. Screenshots are the fastest way to show what you're building. Video walkthroughs of the product or pitch are too in-depth."



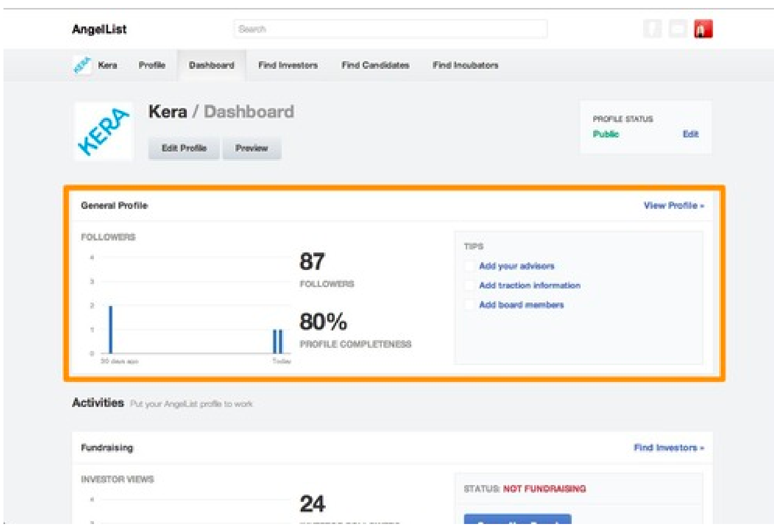
Section Specific ToolTips

For the more complex profile information, Angel List implemented tool tips with concrete examples. These are the types of questions that can really slow you down, so having specific examples shrinks the challenge.



Profile Completeness

At first I didn't think that Angel List had a profile completeness feature, but it turns out they do, tucked away in the dashboard. There are a series of three "tips" next to the progress bar, and when you click on one of the tips, they jump to the appropriate URL.



STRENGTHS

1. Good use of Wizard Pattern - this is a convention we also use, and it's interesting to see how they include the easier information first, moving on to the more complex information later.
2. In-line Edit State - 9 - It's really nice that you don't have to go to a separate page to edit a section of your profile. Rather, when you click an edit button, the section changes into a different state that lets you edit on the fly.
3. Profile Completeness - If you can find it, the profile completeness widget is an effective and motivating

guide.

AREAS OF OPPORTUNITY

1. It's hard to tell what the priority of the sections are. I think this is key when you're presented with such a large amount of content to produce.
2. I think there's an opportunity for Angel List to explicitly communicate the benefits of a complete profile. Are my chances better of receiving investor interest?
3. In order to increase motivation and feedback, it would be good to raise the prominence of the profile completeness widget. It should be front and center throughout the onboarding process, not hidden in a secondary page (the dashboard, which becomes more important later on in the lifecycle).

Of course you can check out Kera's Angel List page, and you can find me on twitter any time of the day.

TWEET EMAIL

Does Changing Your Font Size Increase Time People Spend On Your Site?

5 APRIL 2013

TAIGE ZHANG

Experiment

Recently we did an experiment to see if decreasing the font size on our blog would increase the time people spent reading our blog. This idea that by decreasing your font size you can get careful reading instead of scanning stemmed from a eye tracking study article.

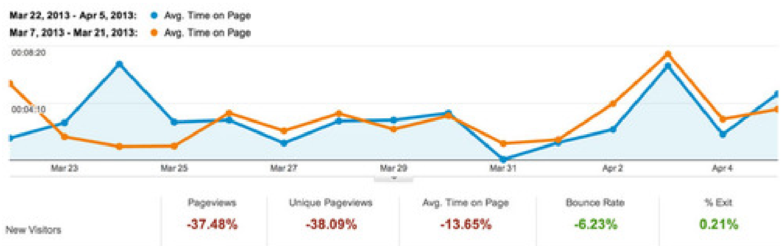
> From Direct Creative:
>
> 5. Smaller type promotes closer reading. This makes sense because smaller type is harder to read. So, to read it, you have to really focus. Larger type promotes scanning rather than reading.
>
> Be careful with this one. No one is suggesting you shrink your web

> type to make it barely legible. I think the takeaway is to avoid making your type too big if you want close reading and avoid making it too small if you want to communicate rapidly.

So on March 21, we changed our font size from 19px to 16px.

I compared visitor activity on our blog from Apr. 5 - Mar. 22nd ("after group") and from Mar. 7th - Mar. 21st ("before group"). To try to control the experiment, I excluded new posts and returning visitors. Each sample group consisted of visitor data collected over 15 days.

Results



Results

We didn't have any increase in time spent on page but was able to reduce bounce rate.

Discussion

The average time on page actually decreased but you look carefully you can see there's an anomaly at March 24. There the "before" time was vastly more than the "after". Since the "average time on page" figure averages the time across all visits and is not weighted by post, a hit post with a lot of traffic one day can significantly skew the data.

It'd be better methodology if the average time on site was averaged per blog post and then averaged again to get the overall change. This would reduce the effects of outliers.

If you look at the graph after that anomaly, it seems the "after" time is roughly on par with or slightly above the "before". I don't believe there is any real significance here worth further testing though.

Bounce rate measures how engaging your content is and if someone leaves your site without looking at another page. Since I don't have good reason to believe decreasing the font size will decrease bounce rate, I'll use a two-tailed test. Running the 2-tailed t-test on the numbers showed a p-value of 0.101 which isn't very significant. Since the p-value (0.101) is greater than the significance level (0.05), we accept the null hypothesis that the two proportions are equal.

In conclusion, going from font size 19px to 16px in the Mercury typeface didn't produce any real benefits.

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Taige Zhang is a Product Marketer at Kera. You can follow him on Twitter at @taigeair.

TAGS: EXPERIMENTS

TWEET EMAIL

Kera 2.0 – Your Very Own Get Started Widget

2 APRIL 2013

TAIGE ZHANG

Today we're announcing our new product, an out-of-the-box Get Started Widget for your web application.

Why?

In the past year, we've been honing our tutorial product, which is similar to WalkMe but more media rich. In the process we realised something: people didn't like to be guided the way we wanted to guide them.

Our data shows 50% of users automatically dismiss a message to start a walkthrough. A/B testing showed no significant boost in conversions from many of our customers who implemented tutorials. And they were blaming themselves and spending more time on improving the tutorials, instead of improving their design and UX.

Then we backed up a bit and realised there's a better way to convert users into active users. Let them do it themselves. Help the users discover your application. Help them only when they ask for help.

What is it?

The completion meter (a type of progress bar) is a tactic used by many web applications to help new users onboard. You've seen it on Google Plus, LinkedIn, and Dropbox. But it's not only the big players who use it - many startups and SaaS companies do as well. Unfortunately, they have to build it themselves.

They're not experts at it. They have to do research and learn a lot. Copy a lot. They're starting from scratch. It's expensive to build. Worst of all, it's hard to maintain for devs. And, we noticed that analytics is usually left out. That's horrible.

It sucks to build it in-house, but guess what? People are doing it because they need it. Now imagine if there was an out of the box solution.

We've built it.

LinkedIn's progress bar. DropBox's Get Started task list. That's what Kera Missions is. It's the "Get Started" widget for everyone.

Build missions for your users to help them fall in love with your app. See exactly which users are doing what. Modify your missions and product based on real-time analytics.

It's really powerful. See what users truly enjoy doing. Get users to do things. Add rewards. Isn't that cool?

Ready to get started?

This easy to implement Get Started Widget can be set up by marketers and then installed in 10 minutes with the help of a developer. Create missions for your users and see who's completing them!

See the new Kera!

Sincerely,

Taige

Product Marketing at Kera

TWEET EMAIL

How 7geese.com Onboards New Users

2 APRIL 2013

MAX CAMERON

7Geese is a social performance tool for tracking goals, receiving recognition, and gathering feedback. Originally from Vancouver, the team is currently in San Francisco, and I was introduced to their CEO, Amin, through a mutual friend.

Amin was interested in Kera, so I created a 7geese account to see exactly what they were up to before we talked. I was really impressed with their first-time-user-experience, so I wanted to share it here.

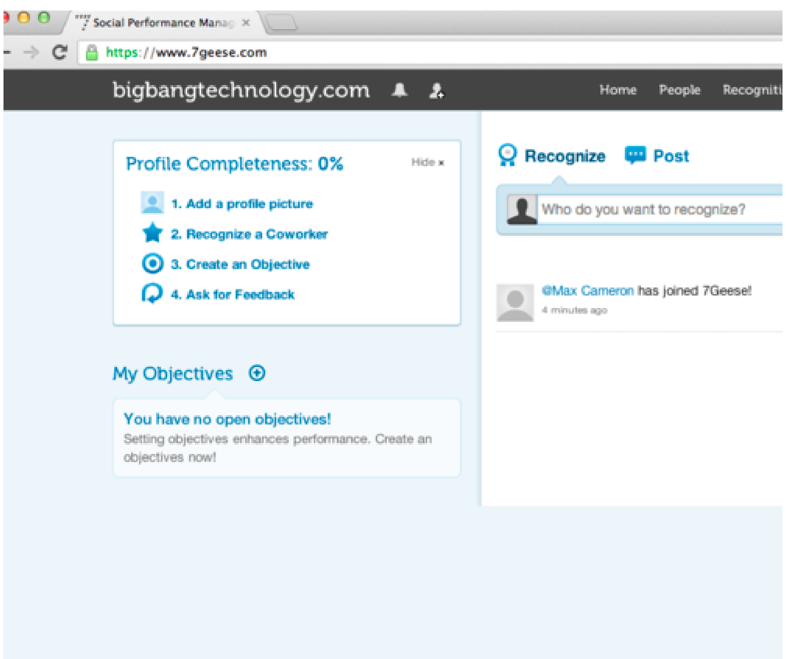
When you first login to 7geese, you see a “profile completeness” widget. It shows me a list of four things I need to do to receive value from the app. Here are the features they chose to include:

1. Add a profile photo
2. Recognize a coworker
3. Create an objective
4. Ask a coworker for feedback

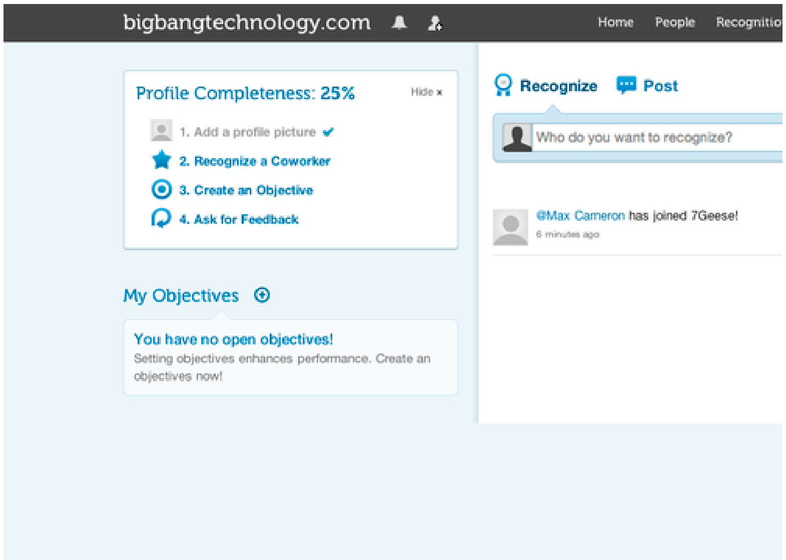
This is how Amin and his team define an activated 7geese user. In other words, this is the minimum set of features that must be used for a user to receive value from 7geese. If a user completes these four steps, they’ll be more likely to convert into a paying customer.

This is effective because it gets you to create an emotional connection between you and the app, makes you commit to using it, and gives you a reason to come back - All within the first five minutes of logging in.

THE BREAKDOWN

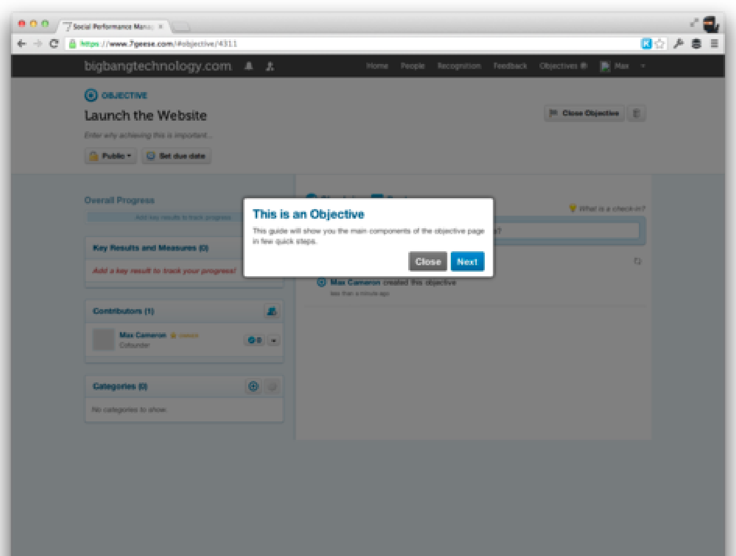


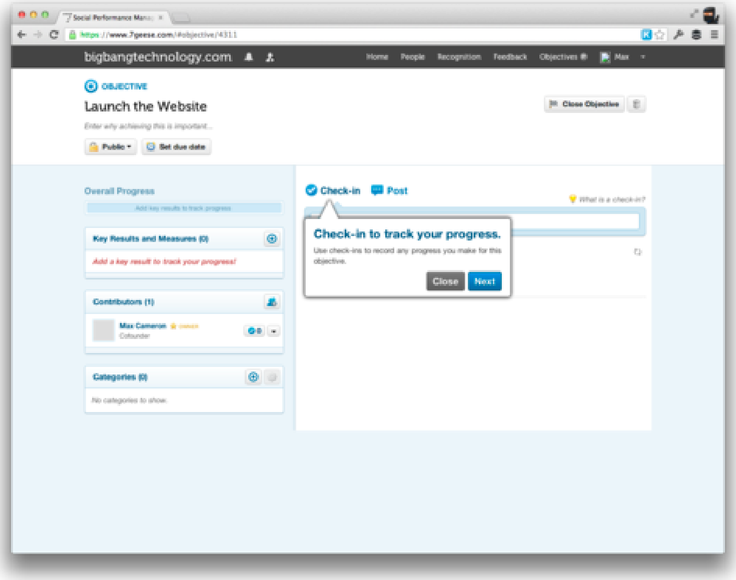
First, I clicked on the “Add a profile photo” link, which took me to the profile page. When I uploaded a photo and returned to the homepage, I saw that I was 25% complete. They started with something easy, which helped build momentum and motivated me to move on to the second task.



Then I went on to recognizing a coworker. When I clicked on the title of the task in the widget, it opened up a modal that allowed me to invite others. This is smart because it sucks another person into the app. Once you invite someone else to join, you feel compelled to take action and recognize them.

By this point I was really motivated to complete my profile, so I created my first objective. This is a slightly more challenging task than adding a profile photo, so they're using guiders.js to walk their users through the workflow. The tooltips are basic, but they're decent sign-posts to show me where to focus my attention.





Once I've completed all the tasks, there's really no reason for the widget to take up so much screen space, so I hit the close button. I was a bit surprised that it closed forever instead of minimizing it, but I'm guessing they don't plan on updating the list very often.

To recap, here's the strengths and areas of opportunity for Amin's approach:

STRENGTHS

1. They chose the right features to define activation
2. I knew exactly what I needed to do to get the most out of their app
3. I wasn't overwhelmed by the onboarding process
4. Using guiders.js for their tooltip framework is more efficient than building it from scratch, and more durable than using a walkthrough service

AREAS OF OPPORTUNITY

1. It took about a week of one developer's time to build - this is a big investment and will probably prevent them from updating or optimizing it
2. They don't collect any analytics on their widget, so I can't see how they'll measure its effectiveness
3. If a user accidentally closes the widget, it's impossible to open it again

Are you using a Get Started widget in your app? Let me know how it's working out for you in the comments.

- @maxcameron

TAGS: ONBOARDING , UX , GAMIFICATION , BEST PRACTICE

TWEET

EMAIL

The Psychology of the Progress Bar

25 MARCH 2013

TAIGE ZHANG

Last week, I wrote a guest blog post for KISSMetrics. It's about the power and psychology of the progress bar. Here's an excerpt:

> Can you get your users to do something simply by asking them to do it? If so – congratulations! You have some awesome users :)
>
> Most of us aren't that lucky. As a matter of fact, asking our users to do something, sometimes has the opposite effect!
>
> There is a usability feature called a completeness meter that is employed by companies like Google, LinkedIn, and Box. These types of progress bars inform users of how close they are to completing a set of tasks by showing percentages of completion along the way.

You can read the full article on their blog.

You can follow me on Twitter at www.twitter.com/taigeair

TAGS: BEST PRACTICE

TWEET

EMAIL

The Google Plus Progress Bar Analysed

20 MARCH 2013

TAIGE ZHANG

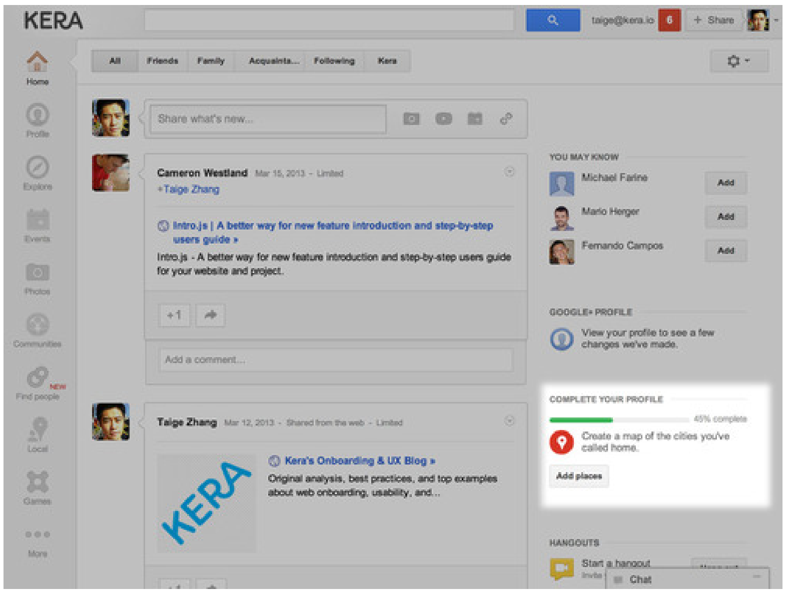
Earlier this month, Google rolled out a progress bar for their prized social network platform Google Plus. It caught our attention.

We believe in the power of progress bars and was happily surprised to see its implementation by Google.

PLACEMENT

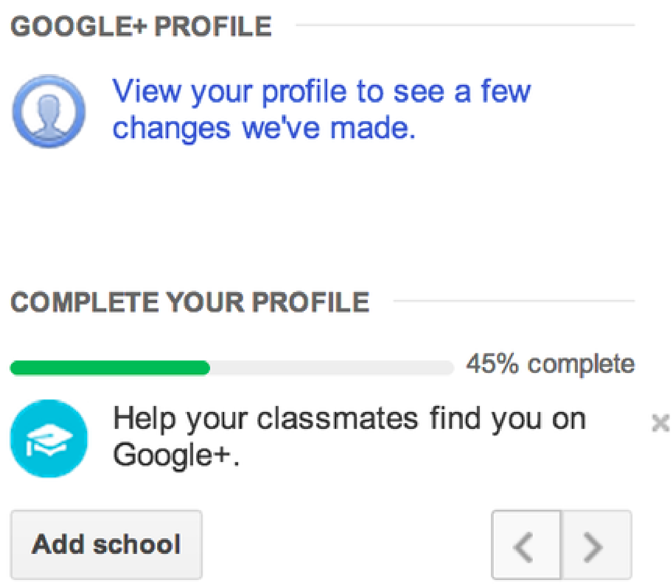
The completion meter (a type of progress bar) is positioned in the lower right hand of the page. This position is optimal because it's not vital information but important enough that your users will see it (and hopefully get to it).

By the way if you're interested in positioning for usability, here are some great resources on better web design through eyeball tracking studies: Usability.gov, DirectCreative and Nichcy.org



THE COMPLETION METER

Google Plus named its completion meter "Complete Your Profile" which gives meaning to the progress bar and also issues a firm command. It shows percentage of profile completed. It also presents a single task you can do to boost your profile. In this case, it's adding a school.



FREEDOM OF CHOICE

There are two arrows that allow you to do another task if you don't want to add a school. This is a great affordance because as a user, if I really don't want to add a school, then I'll be forever stuck.

This is akin to presenting multiple missions in a game that gives the user freedom to choose. However, due to space constraints, they are not shown, unless the arrows are clicked.

WIDGET PERMANENCE

If you click on the X, the progress bar will be removed from your profile forever! I am not sure how to get the progress bar back. It's interesting companies like Box and Google choose to allow users to remove the progress bar (and making it impossible to undo), while companies like OKCupid and LinkedIn make the progress bar perpetual.

I can understand progress bars can cause stress and tension for the user which is why they allow users to remove them but users also want to find out about cool features and get the most out of the app. What happens when I want to have it back? There should definitely be a way to get back on track.

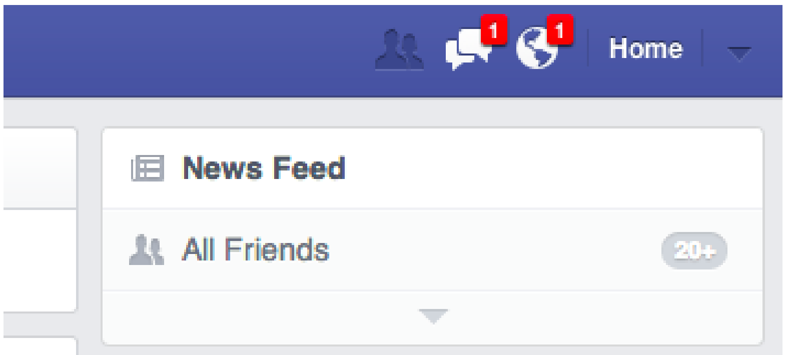
LinkedIn's Profile Strength Indicator persists even after you reach 100%; while some companies such as Dropbox and 7Geese remove their progress bars after users have onboarded. This makes sense once you're onboarded, there's no need to provide you with missions anymore.

The progress bar is the cocoon of a butterfly.

ADDING MISSIONS

However, in the case of games additional value may be provided by releasing new missions. Some games have a notification centre that can be inbox-zero but you will see a badge every time a new mission is available.

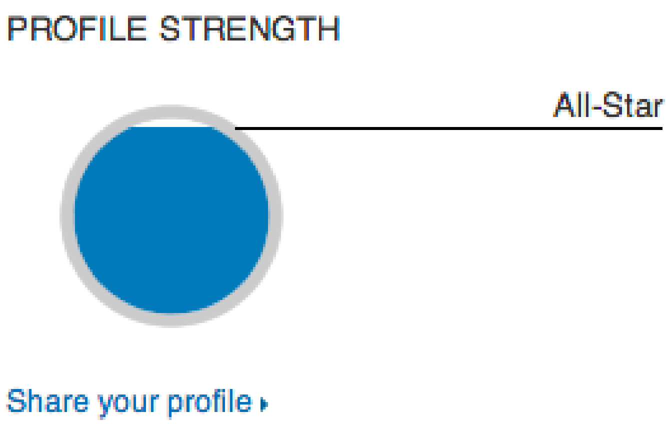
We're all used to that because Facebook does the same thing to get us to check messages which are game-like in that they can be to-do items. Like missions.



In the case of onboard-once web apps, perhaps there are no plans for future missions so there's no reason to condition the user to associate that part of the UI with new missions.

New missions should not be presented as a progress bar because that would mean taking away progress from the user. Dr. Liu of MIT Media Lab and hunch.com states: "Progress bars must only advance, and never move back."

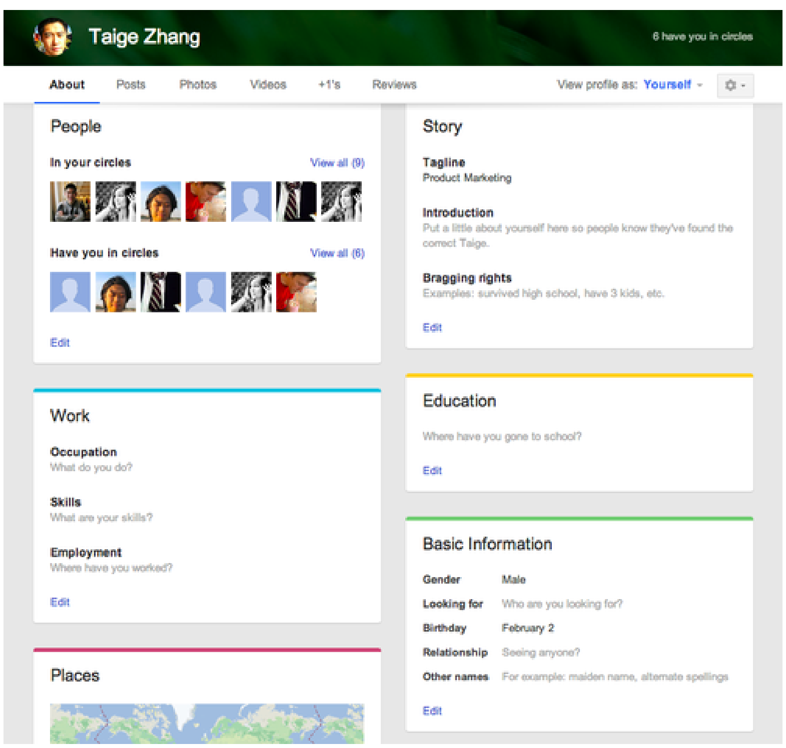
Perhaps the need to add missions without retracting progress is why LinkedIn changed from a completion meter to a profile strength badge. Or maybe it was a design choice or based on research people preferred filling out a circle better than a bar or it was more fun to give ranks. Maybe it's a combination but my hunch is that LinkedIn wants to introduce new missions.



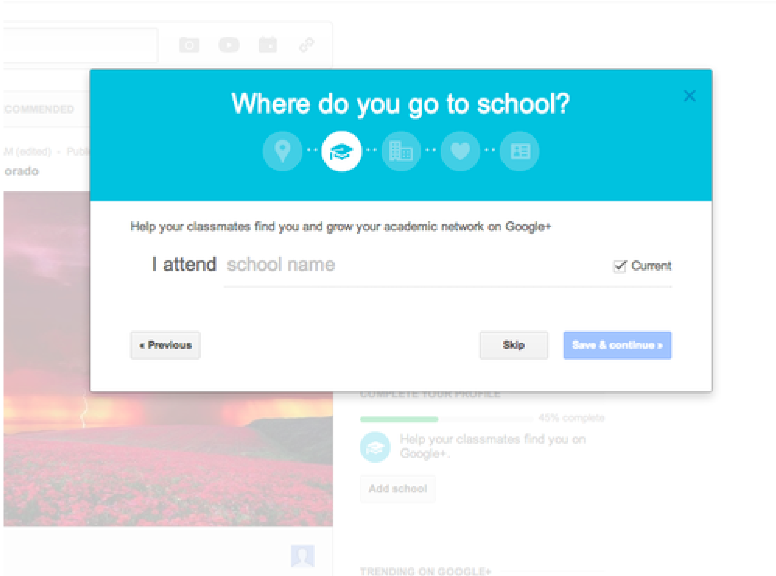
GOOGLE PLUS MISSIONS

If you choose to accept a mission, in this case, add a school, you'll see a modal that helps you complete your profile. This makes it a lot easier, seamless, and more fun than taking you to a standard page where you could provide the information.

This is the standard edit profile page it doesn't take you to.



THE MISSION MODAL



This is excellent because once you get started with filling out your school. You're in the filling-out-stuff state. What better time to give you more similar, uncompleted tasks? Google would love to get you to complete all that information.

Like Tetris, Google loads it on.

DISCUSSION

I'm curious what results Google achieved with this. Did they boost the percentage of people with complete profiles? Did they get more info per user? Did they get it faster?

I'd love it if Google could share some stats on this. I've reached out to them and am waiting to hear back.

Facebook is also doing something cool to get users to do stuff. Not onboarding but worth reading if you're interested in product and UX design.

Subscribe to this blog and follow us on Twitter to get more onboarding and UX news.

Note: This section will be updated if I get feedback on Google's results.

By Taige Zhang (email: taige@kera.io)

TAGS: BEST PRACTICE , ONBOARDING , UX , GAMIFICATION , GOOGLE , LINKEDIN , FACEBOOK

TWEET EMAIL

Product Page Report Card - AeroFS (A-)

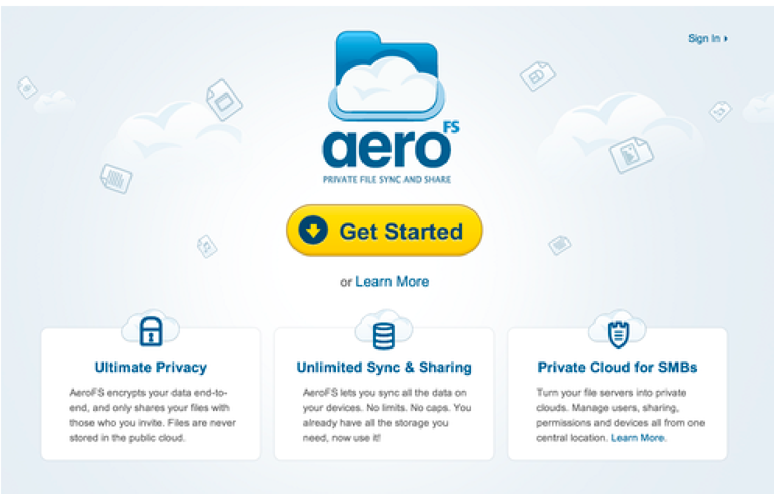
14 MARCH 2013
TAIGE ZHANG

This is our second product site review! In our Product Page Report Card series we analyse and grade how web applications introduce their product and onboard their users. We have a queue of companies to review and it's a lot of fun.

Today, we'll be looking at AeroFS.

INITIAL IMPRESSION

Simple and minimal. Feeling of fast and light. Action-oriented because of its large CTA. Not much selling happening.



GRADING CRITERIA

1. Hook: Websites should convey a key idea or concept to help the user put the product in an easily understandable category first: Meaning first, details second. AeroFS's hook is right under its logo. "Private file sync and share." It makes a clear statement that leads the user to ask, "Interesting, details please?" Grade: A

2. Problem and Pain Explained: It is important to highlight the problem and pain before offering a solution. AeroFS does this with some questions in the features section:

> Need to manage multiple users? Control sharing outside of your team? Auditing? Backup for all your employee devices? Then AeroFS Business solutions may be for you.

Grade: A-

3. Top Level Picture: AeroFS clearly states what it's about on its home page with its hook/tagline: "private file sync and share". It's 5 words but I'm sure a lot of thought went into it. Its reference to Dropbox is great and a powerful shortcut to explaining the product. Grade: A+

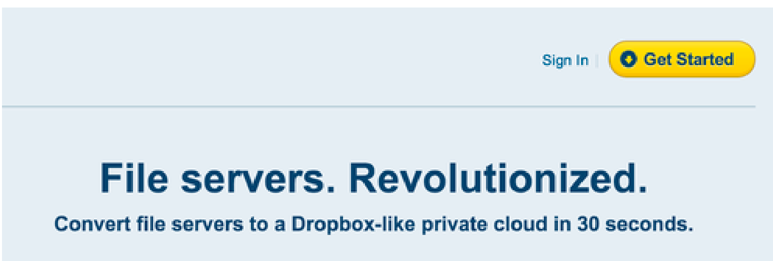
4. Three Key Benefits Explained: It's free, private, and unlimited. These points are emphasised repeatedly, while other benefits are mentioned less. Grade: A

5. Social Proof & Partners: AeroFS doesn't list many customers or partners, but some press mention on the pricing page helps. Grade: B+

6. Multimedia & Video: AeroFS doesn't use multimedia or video. Grade: C

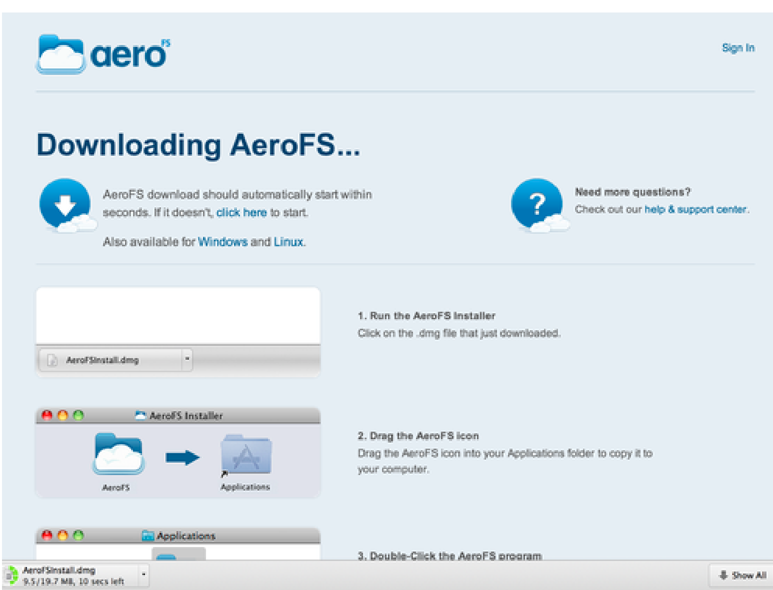
7. Use Cases: AeroFS doesn't use multimedia or video. Grade: C

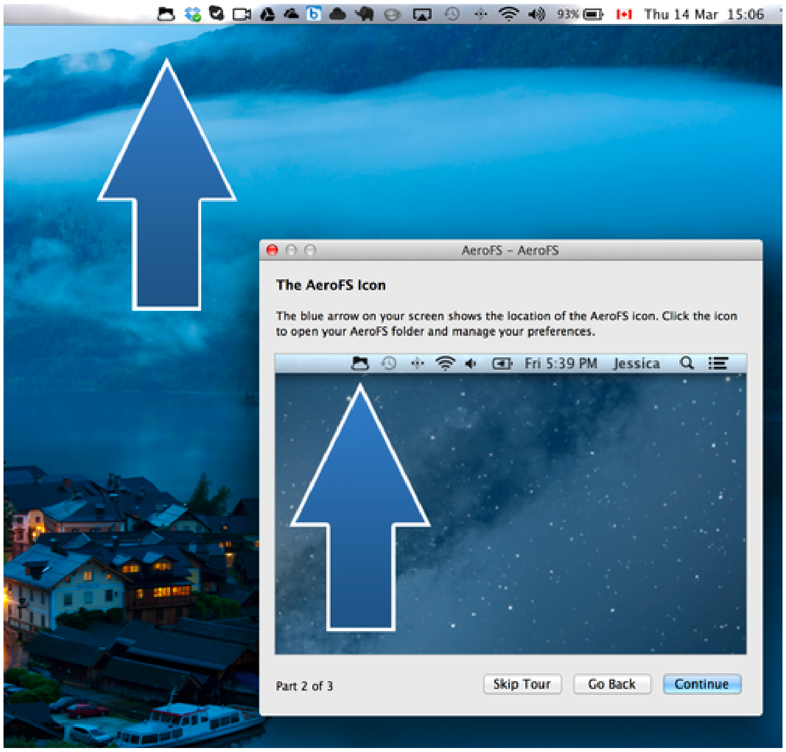
8. Calls to Action: Get started is massive and pretty much the only thing you'll click.



Grade: A

9. Onboarding: AeroFS makes sure you're taken care of as soon as you sign up. You'll be shown what to do, where to click and where to look. It doesn't leave its users in the dark.





Grade: A+

OVERALL GRADE: A-

AeroFS does a fantastic job of explaining the product and highlighting the benefits. It did really well in the hook and top level overview but missed out on areas such as using multimedia and use cases.

Be sure to comment or get in touch if you want to be reviewed.

You should follow Kera on twitter here.

Taige Zhang
Product Marketing at Kera

TAGS: PRODUCT PAGE REPORT CARD

TWEET EMAIL

7 Must Read Articles about User Onboarding

12 MARCH 2013

TAIGE ZHANG

These gold mine, bombshell articles will blow your mind away! We know you're looking for onboarding best practices and ways to convert more of your visitors into customers so we've compiled this list of jaw-dropping articles. In no special order.

Here are our favourites:

1. How to Manufacture Desire (TechCrunch)

Nir Eyal explains how to create the internal triggers in your application to form user habits.

2. A Lesson in Gradual Engagement (UX Booth)

Nathan Barry introduces the concept of gradual engagement by enticing users to use an application (marketing) while teaching them how to use it (onboarding).

3. Five killer ways to use onboarding (Net Magazine)

Gene Crawford uses 5 excellent onboarding examples to outline the concept of completionist onboarding.

4. Designing Great Feedback Loops (Smashing Magazine)

Loren Baxter explores how to use great feedback loops to create a great user experience.

5. Wunderlist's Cross-Platform Acquisition & Onboarding Process (UX Mag)

Sachendra Yadav thoroughly analyses the onboarding process at Wunderlist.

6. Onboarding: The First, Best Chance to Make a Repeat Customer (Justin-Singer.com)

Justin Singer breaks onboarding into 3 parts: explaining the product, demonstrating value, and fostering enjoyment.

7. Chapter 4. Game Mechanics: Designing for Engagement Part II (O'Reilly Media)

Gabe Zichermann and Christopher Cunningham describe how to craft a perfect onboarding experience in their book Gamification by Design.

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Follow Taige Zhang on Twitter: www.twitter.com/taigeair

TAGS: ONBOARDING

TWEET EMAIL

What Facebook Graph Search Looks Like

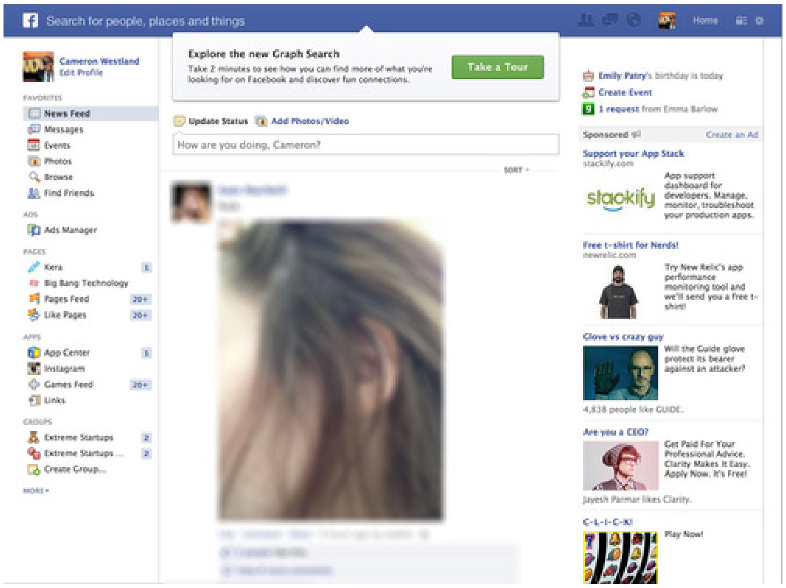
7 MARCH 2013

BY TAIGE ZHANG

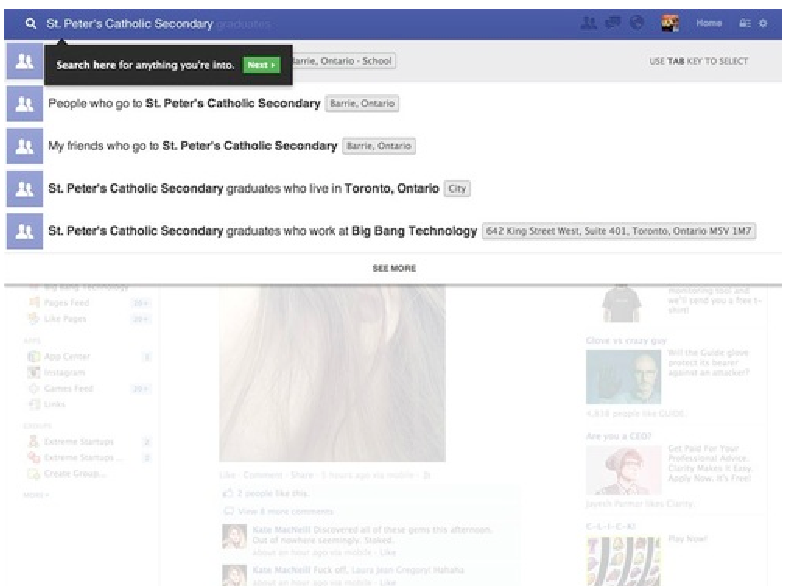
Facebook is rolling out a new feature called Graph Search. It's in beta right now and not available to everyone (request early access at Graph Search) but if you're eager to take a look, we'll show you what Graph Search looks like.

I also want to highlight Graph Search's first time user experience. It's interesting to see how web companies launch new features. I think this feature tour is excellence because its minimal yet effective. Let's see how they expose their new feature to users.

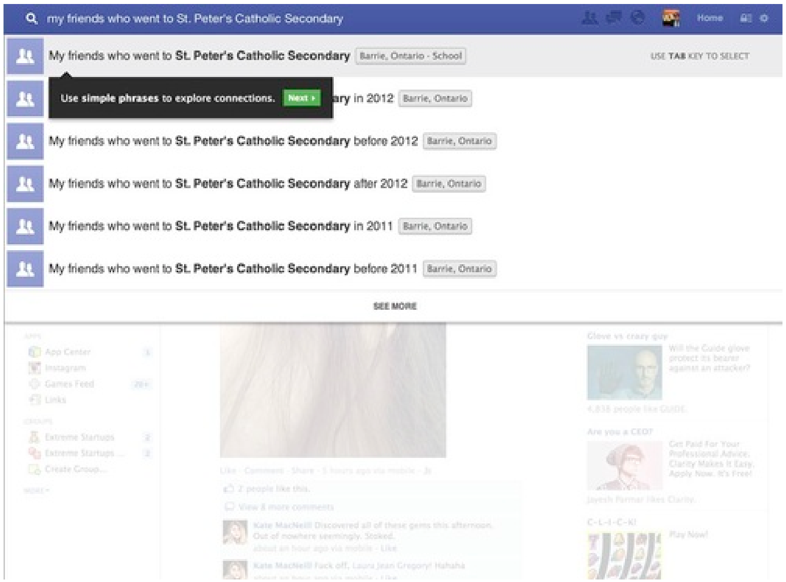
Once Graph Search is made available to you, you'll see the "take a tour" tooltip on your FB newsfeed. Click on it to start the tour.



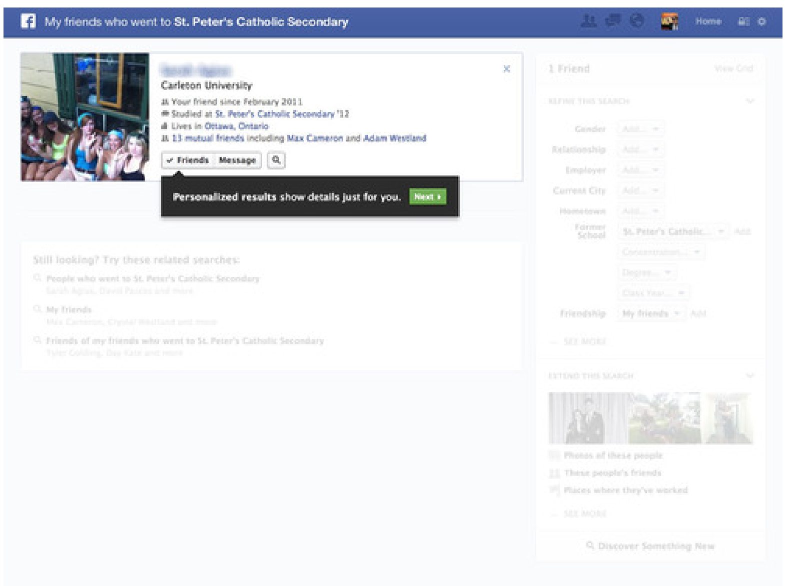
Then FB introduces you to the search bar UI and asks you to make your first search while greying out the rest of facebook. Like Google, it auto suggests some searches for you.



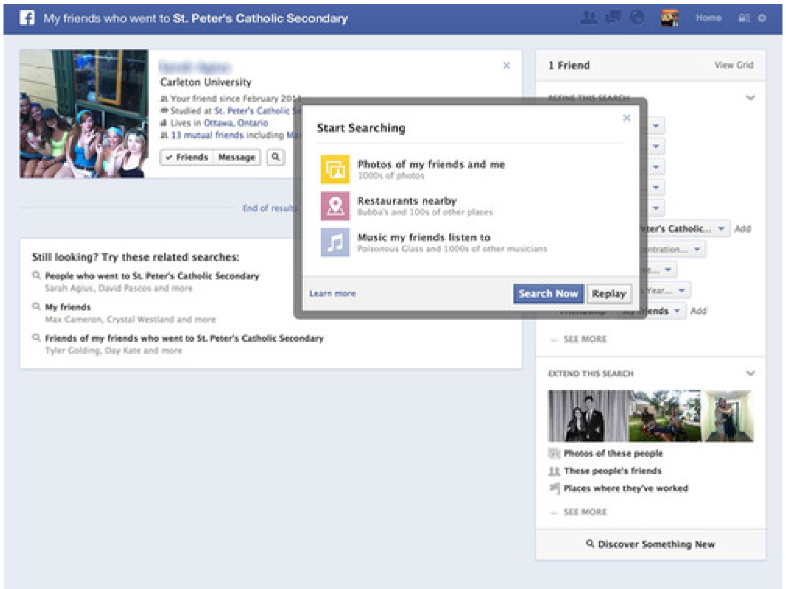
Next, Facebook explains how you can use simple phrases to further explore the search item you are interested in.



It tells you this is where friend summaries and relationships are displayed.



Finally, the interactive product tutorial is over. It now asks you do your own search and gives some examples.



This is a video of the Facebook Graph Search Tutorial.

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Follow Taige Zhang on Twitter: www.twitter.com/taigeair

TAGS: FACEBOOK , PRODUCT TOUR VIDEOS , ONBOARDING EXAMPLE , BEST PRACTICE

TWEET EMAIL

Getting Started on CastleVille

5 MARCH 2013

TAIGE ZHANG

This is the first time user experience for a top Facebook game, CastleVille. Here I walk you through the first minutes of the game by Zynga.

The key elements:

1. Customisable profile
2. Modal messaging
3. Spotlighting
4. Tooltips
5. Checklist and progress menu for quests
6. Freedom to choose missions

You should subscribe to How Online Games Onboard - References for UX Designers.

—-

Follow Taige Zhang on Twitter: www.twitter.com/taigeair

TWEET EMAIL

Product Page Report Card - DataSift (A+)

1 MARCH 2013

We're all about onboarding and helping websites turn visitors into core users at Kera. We're kicking off a new series you can follow called Product Page Report Card. In this series we will analyse and grade web product pages.

DataSift will be analysed in this article. You can submit your site to be analysed by commenting on this post.

Initial Impression

There are two prominent buttons. Take a Tour and Free Trial. I see a lot of social media icons and the name DataSift makes me think it's a tool to analyse social data. Still I have no idea what it does. There's a lot of text on the page so I ignore it because I'm not hooked. They haven't given me a reason to look further yet.

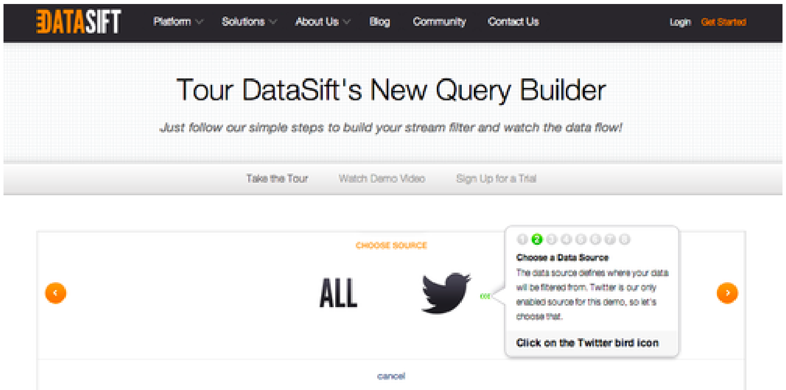
Carmine Gallo from The Presentation Secrets of Steve Jobs:

> According to scientist John Medina, our brains were formed to see the big picture. Medina says that when primitive man saw a saber-toothed tiger, he asked himself, "Will it eat me?" and not "How many teeth does it have?"

In the same way, websites should convey meaning such as key idea or concept to help the user put the product in an easily understandable category first. And then begin to paint a more detailed picture.

To try to understand what the product is about I click on Take a Tour. There, I'm hooked.

Grading Criteria



1. Hook - The purpose of the hook is to arouse the audience's attention and interest. DataSift does this by launching you into an interactive tutorial. It's very powerful because it is engaging the user and getting the user involved. Similar to the famous and often cited Codecademy hook.

Grade: A+

2. Problem and Pain Explained - In the famous book SPIN Selling by Neil Rackham, one of the main messages is the importance of drawing out implied need and asking the right questions to develop the seriousness of the problem before offering a solution.

From the book:

> This is the central purpose of Implication Questions in larger sales. They take a problem that the buyer perceives to be small and build it up into a problem large enough to justify action.
> …
> There have been many occasions when we've been talking to decision makers after a call and heard them
> comment favourably on salespeople who asked them Implication Questions, saying things like "that person talked my language "
> Implications are the language of decision makers, and if you can talk their language, you'll influence them better.

DataSift doesn't spend much time emphasising the pain or empathising with users initially but if you go into their plans and industry section, you'll see some of this technique. From their plans page:

> I'm a small business or start up with under 250 employees looking for a certified data partner that can aggregate many social sources and can help me target social users by sophisticated filters.

This is DataSift's weakest area. It can be improved by better conveying its knowledge of the customer's pain.

Grade: B+

3. Top Level Picture - DataSift quickly explains it is a social data platform in its video. It also clearly states what it's about on its home page with this line:

> DataSift is the leading platform for building applications with insights derived from the most popular social networks and news sources.

If you're not in the sector, it still might be confusing what that sentence means. There's some business speak in there, but taking a quick tour or watching the video clarifies a lot.

Grade: A

4. 3 Key Benefits Explained - It's best to only include 3 key benefits because that's the optimal number to be able to persuade and still be retained. Once you end up on their trial page. You're hit with the 3 key persuasive arguments. My interpretation of their benefits:

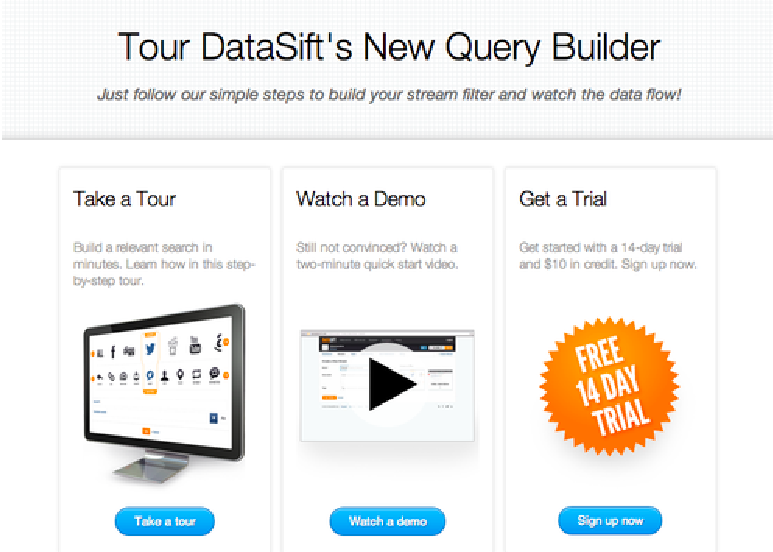
1. Unlocks value in your data
2. Works with your existing BI products
3. Scalable

Copy could be better though.

Grade: A

5. Social Proof & Partners - Customer evidence is one of the most powerful tools in marketing. Showing off your customers and partners provides trust and reduces perceived risks. DataSift has a lot of coverage from notable news publications such as Bloomberg, TechCrunch, and Forbes. It's also a Twitter partner. However, not showing which companies are using its platform is a shortcoming.

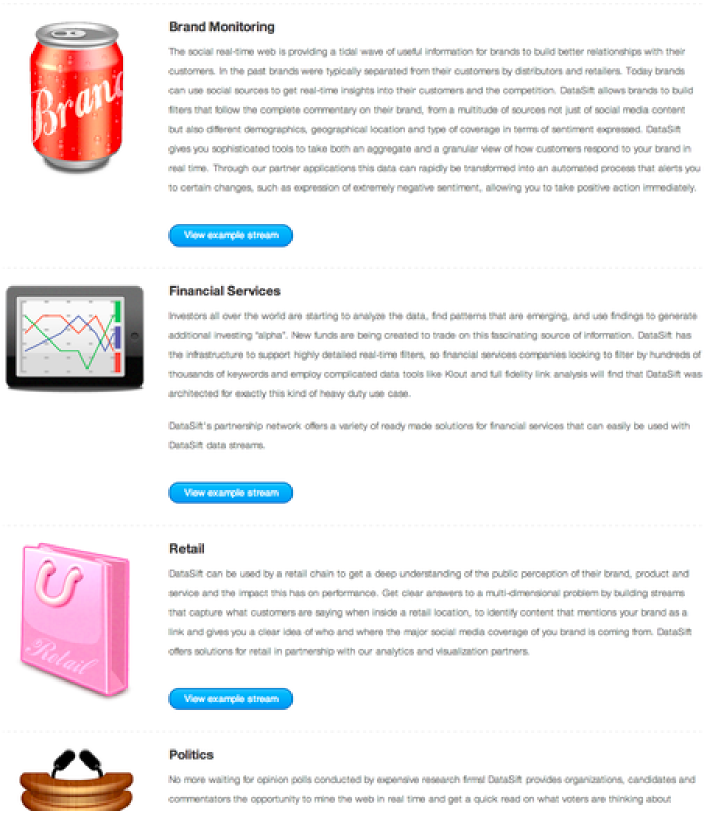
Grade: A-



6. Multimedia & Video - Videos are vital to communication and conversion. You need multimedia to keep the visitor interested and engaged in your messaging. Furthermore, there are 3 types of learners: visual, auditory, and kinesthetic. DataSift engages all of the learning types. DataSift has a pretty decent video explaining their product with audio and visuals. They also use an interactive tutorial that gets the hand-on visitor trying the tool without needing to sign up!

Grade: A+

7. Use Cases - Uses cases makes it clear to the visitor how the product can be valuable in their lives. This is where DataSift excels. They go into industries and spell out the value for the visitor.



Brand Monitoring

The social real-time web is providing a tidal wave of useful information for brands to build better relationships with their customers. In the past brands were typically separated from their customers by distributors and retailers. Today brands can use social sources to get real-time insights into their customers and the competition. DataSift allows brands to build filters that follow the complete commentary on their brand, from a multitude of sources not just of social media content but also different demographics, geographical location and type of coverage in terms of sentiment expressed. DataSift gives you sophisticated tools to take both an aggregate and a granular view of how customers respond to your brand in real time. Through our partner applications this data can rapidly be transformed into an automated process that alerts you to certain changes, such as expression of extremely negative sentiment, allowing you to take positive action immediately.

View example stream

Financial Services

Investors all over the world are starting to analyze the data, find patterns that are emerging, and use findings to generate additional investing "alpha". New funds are being created to trade on this fascinating source of information. DataSift has the infrastructure to support highly detailed real-time filters, so financial services companies looking to filter by hundreds of thousands of keywords and employ complicated data tools like Klout and full fidelity link analysis will find that DataSift was architected for exactly this kind of heavy duty use case.

DataSift's partnership network offers a variety of ready made solutions for financial services that can easily be used with DataSift data streams.

View example stream

Retail

DataSift can be used by a retail chain to get a deep understanding of the public perception of their brand, product and service and the impact this has on performance. Get clear answers to a multi-dimensional problem by building streams that capture what customers are saying when inside a retail location, to identify content that mentions your brand as a link and gives you a clear idea of who and where the major social media coverage of you brand is coming from. DataSift offers solutions for retail in partnership with our analytics and visualization partners.

View example stream

Politics

No more waiting for opinion polls conducted by expensive research firms! DataSift provides organizations, candidates and commentators the opportunity to mine the web in real time and get a quick read on what voters are thinking about

For example, finance. Bloomberg:

> Since DataSift introduced a product for financial firms in September, customers have been using the software to gain insight into sentiment around companies ranging from Facebook to Research In Motion, and determine how that influences stocks or correlates with price movements, said Rob Bailey, DataSift's chief executive officer.

Grade: A+

8. Calls to Action - Having multiple calls to action is great. Using different copy for calls to action is excellent. They definitely make it easy for a visitor to buy.

Grade: A+

Overall grade: A+

DataSift does an excellent job of showcasing its platform. It scored highly on all of our product page criteria. This is definitely a good example of a well made product page and tour.

You should follow Kera on twitter here.

Taige Zhang
Product Marketing at Kera

TAGS: PRODUCT PAGE REPORT CARD

TWEET

EMAIL

26 FEBRUARY 2013

Ever wonder what the first time user experience is like for the top game on Facebook? Zynga Poker is the top game and in the video I'll take you through their game tutorial.

Having never really played poker, I thought they did a great job of getting me to learn the game and to feel confident about playing it. Unlike Pet Party which uses a simple pointer for onboarding, this game's tutorial is almost exactly like the Kera Step-by-Step Tutorial.

Zynga Poker Game Tutorial

Similarities with Kera Step-by-Step Tutorials:

- Both use subtitles for narration and guidance.
- Both use next button to advance the tutorial.
- Both point to and highlight elements in the game or web application.
- Both ask users to take action such as clicking on things.
- No audio required.

Differences:

- Kera doesn't have a hot avatar chick.
- Kera doesn't have a back button.
- Kera doesn't have a hover-over layer that explains stuff. (See step 4 of Zynga Poker tutorial.)
- Kera doesn't have a tutorial overview progress bar.

By the way, if you haven't seen a Step-by-Step Kera tutorial and have no idea what I'm talking about go to our home page and find and click on the word "maintain." Kera is a platform that allows web applications to easily build interactive tutorials for their web applications to onboard users the way games do.

Discussion

Do you like Pet Party's onboarding experience or Zynga's better? How does your web application onboard users? Do you think there's anything you can take from these game designers to make your onboarding better?

You should subscribe to How Online Games Onboard - References for UX Designers.

—- by Taige (@taigeair)

TAGS: LEVERAGING GREAT GAME DESIGN IN WEB APPS BLOG SERIES

TWEET EMAIL

Part 2: Kera's Definitive List of Top 50 Best Product Tour Videos

22 FEBRUARY 2013

This is the second part of our Definitive List of Top 50 Best Product Tour Videos.

If you're reading this list, you're probably interested in making your own explainer videos. First check out these brilliant videos below and get some ideas. After that, you'll find some tips on how you can make a powerful explainer video too.

26. Lytro Product Tour Video

Brilliance: It shows rather than tells.
Who made it: storydeveloping.com

27. MyiBidder Explainer Video

Brilliance: Explains the pain in a fun and effective way.
Who made it: mindbugstudios.com

28. TaskRabbit How it Works Video

Brilliance: Relates pain to your life.
Who made it: epipheo.com

29. Gigwalk Explainer Video

Brilliance: Makes it seem your wish came true.
Who made it: 129films.com

30. Nexxr How It Works Video

Video not found.

Brilliance: Uses an example of a target customer to explain the concept.
Who made it: motioncrafter.com

31. Cake Health Intro Video

Brilliance: Relates problem to your life.
Who made it: epipheo.com

32. Easy Taxi Product Video

Brilliance: Shows the full process in action.
Who made it: mindbugstudios.com

33. WillCall Commercial

Brilliance: Shows product working in a fun life. Kind of like Google Glass video (which was released after list was created).
Who made it: sprinklelab.com

34. FlightPooling Intro Video

Brilliance: Changes your assumptions.
Who made it: videosharks.com

35. Shopify Welcome Video

Brilliance: States your goals and explains how product makes it easy.
Who made it: simplestoryvideos.com

36. RedBox Intro Video

Brilliance: Explains full process in efficient and relatable way.
Who made it: epipheo.com

37. Rypple Welcome Video

Brilliance: Ties problems to solution offered.
Who made it: switchvideo.com

38. ManPacks Explainer Video

Brilliance: Makes it fun.
Who made it: epipheo.com

39. 4 Chords How It Works Video

Brilliance: Uses a great relatable example.
Who made it: mypromovideos.com

40. Parallels Rap Explainer-ish Video

Brilliance: Presents product in a fun way.
Who made it: seedwell.com

41. Boxee How It Works Video

Brilliance: Great hook.
Who made it: loosekeys.tv

42. Seamless Intro Video

Brilliance: Great story arch and visuals.
Who made it: illustrateitvideo.com

43. MakeUseOf

Brilliance: Great hook.
Who made it: thinkmojo.net

44. Tripit Product Tour

Brilliance: Great at increasing perceived pain.
Who made it: epipheo.com

45. Picatic How It Works Video

Brilliance: Great example to explain concept.
Who made it: switchvideo.com

46. Pandora How It Works Video

Brilliance: Educates users.
Who made it: 129films.com

47. Babbel Explainer Teaser

Brilliance: Simple and fast - conveys product.
Who made it: lucaszanotto.com

48. Mailbox App Demo Video

Brilliance: Shows product in action.
Who made it: In-house?

49. 1800 Registry Product Video

Brilliance: Very laid-back, supportive, and trustworthy tone.
Who made it: picturelab.tv

50. LastPass Concept Video

Brilliance: Great at illustrating problem and solution.
Who made it: videoexplainers.com

Notable mention:

Mable

Must Read Articles on Explainer Videos

Here are some awesome articles to get you started on your quest to make a great explainer video.

Getting Prepared: Research and Planning

Explainer Videos – The best of the best (Switch Video)

How Much Does an Explainer Video Cost? (Video Brewery)

Five Benefits Of Telling Your Story With Explainer Videos (Wistia)

Does your startup need a product overview video? (Design Staff)

Making a Video: Step by Step Guide and Tips

60 Seconds – How to tell your company's story & the brain science to make it stick (Switch Video Ebook)

Stop Creating Explainer Videos, You're Doing It All Wrong! (Neil Patel)

9 Insider Tips for Creating a Killer Explainer Video (Kissmetrics)

How to Create Your Own Promo Video for Under $100 (Kissmetrics)

Written by Taige Zhang (@taigeair)

TAGS: PRODUCT TOUR VIDEOS

TWEET EMAIL

How Social Games Onboard: Pet Party

20 FEBRUARY 2013

It's interesting to see how games onboard new players. Pet Party is a social game that uses animated cursors and messages to quickly teach a player the basic game play and game interface.

—- Taige Zhang

TAGS: LEVERAGING GREAT GAME DESIGN IN WEB APPS BLOG SERIES

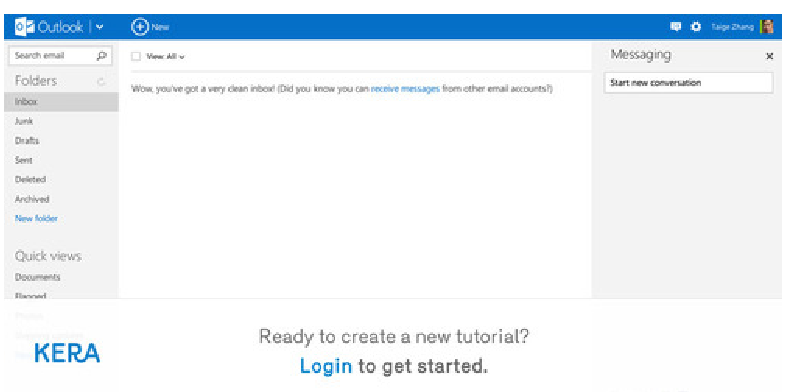
TWEET EMAIL

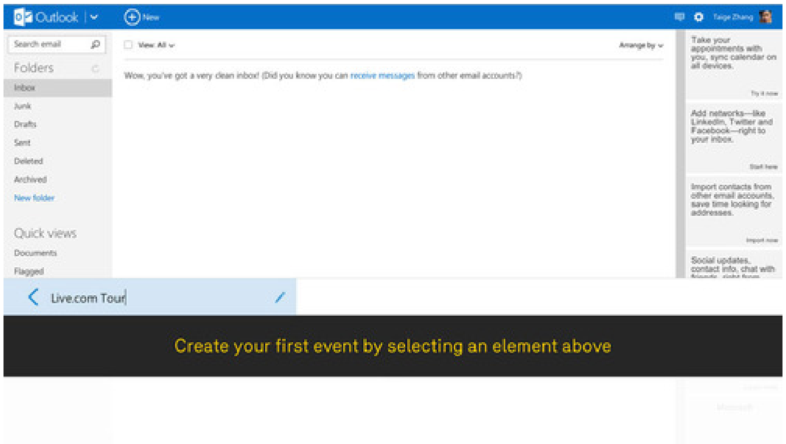
Kera Preview: Fast, Interactive Tutorials Without Any Coding

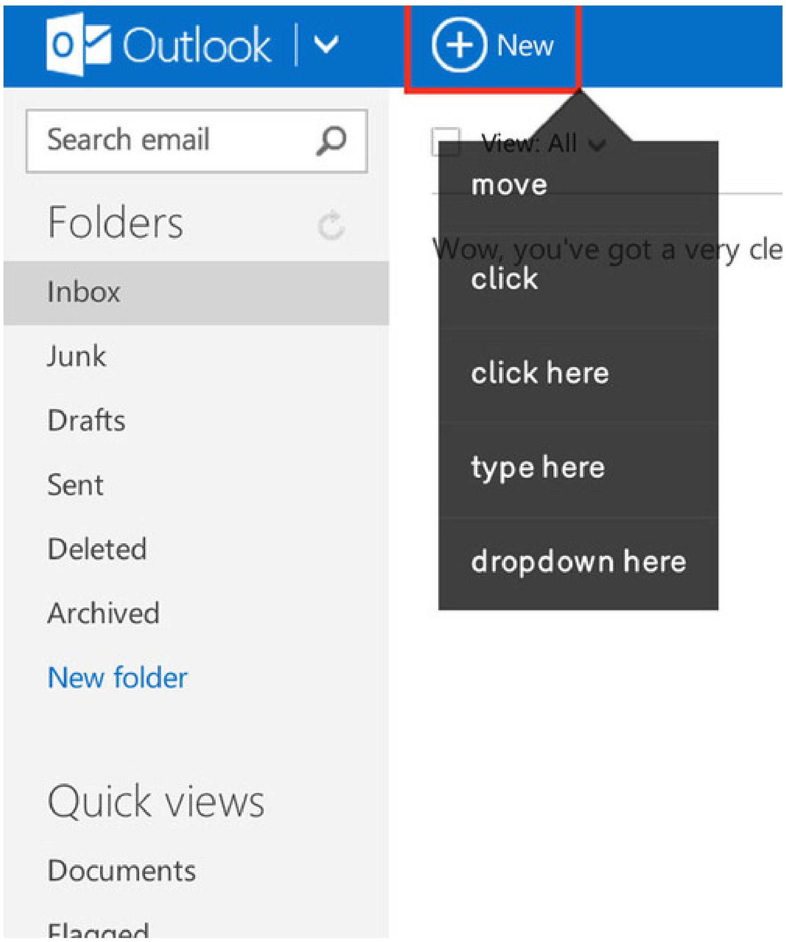
14 FEBRUARY 2013

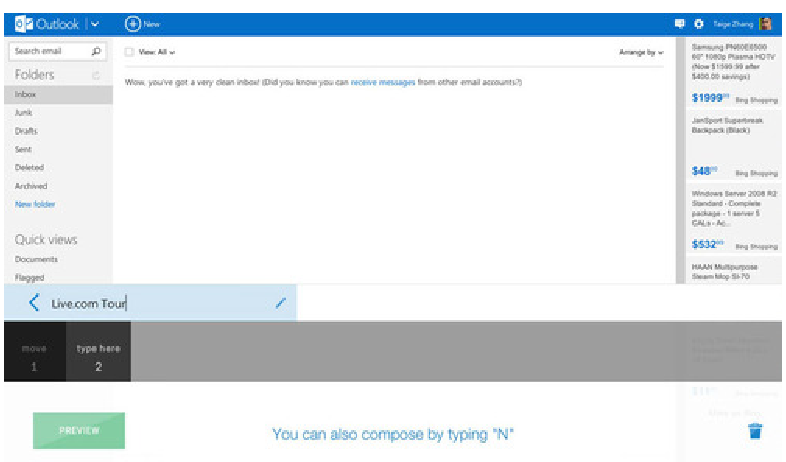
When work started on Kera nearly a year ago, we thought we were building an exciting new tool for developers. However, to our surprise, the majority of our early signups were not exclusively the engineers and designers we expected. Instead we were pleased to welcome users from the front lines. Marketing, support, customer success and others in-between arrived seeking an innovative platform to boost conversions and reduce churn. The only trouble was that up to now, most of those excited signups haven't been able to use Kera without support from their product teams – resources that are so often tough to come by.

Those users came to the right place, but Kera wasn't their size. In response to this learning we've spent the last while working on a platform for non-technical users. Large, complex tools have been distilled into a simple, tidy interface that we're excited to be releasing in the coming weeks. This new interface for authoring and editing Kera walkthroughs will be distributed as a Chrome extension, a light and versatile way for you to experiment with Kera and rapidly learn how we can add real value to your business.




Outlook
New
Search email
Folders
Inbox
Junk
Drafts
Sent
Deleted
Archived
New folder
Quick views
Documents
Flagged
View: All
Arrange by
Wow, you've got a very clean inbox! (Did you know you can receive messages from other email accounts?)
Take your appointments with you, sync calendar on all devices.
Add networks—like LinkedIn, Twitter and Facebook—right to your inbox.
Import contacts from other email accounts, save time looking for addresses.
Live.com Tour
Create your first event by selecting an element above


Outlook
New
Search email
Folders
Inbox
Junk
Drafts
Sent
Deleted
Archived
New folder
Quick views
Documents
View: All
move
click
click here
type here
dropdown here


Outlook
New
Search email
Folders
Inbox
Junk
Drafts
Sent
Deleted
Archived
New folder
Quick views
Documents
Flagged
View: All
Arrange by
Wow, you've got a very clean inbox! (Did you know you can receive messages from other email accounts?)
Live.com Tour
move
1
type here
2
PREVIEW
You can also compose by typing "N"

The first release of the Kera Editor includes the following:

- Interface layered over your website or application
- Author step-by-step walkthroughs with basic events* and subtitles
- Rapidly sketch and refine walkthroughs by interacting directly with your website or application
- Toggle a walkthrough's status from draft to live
- Edit and delete your walkthroughs

What you won't be able to do (yet…)

- Upload or record audio
- Add advanced events**
- Sync events to an audio timeline
- Instrument analytics for your walkthroughs
- Monitor walkthrough analytics

* Basic events include click, move, click here, type here, dropdown here
** Advanced events include pause, input_change, eval_javascript and others

Limitations? Sure, there's lots of them. But, as always, speedy shipping trumps feature spoils. We wanted to get a non-technical authoring/editing interface in your hands as soon as possible. So try it out, tell us your story and help us make sure the features in the next releases of Kera are exactly what you need to succeed.

While this is only the first step, the Kera team is very excited to connect you, our users, with the tools you've been asking for. It may still be a bit rough around the edges, but it ought to get you off to a good start. For the next few weeks the Kera Editor extension will only be available to a small, closed group. Public release is slated for March but you can contact max@kera.io to request early access

—- Jon Friis

TAGS: PRODUCT PREVIEW

TWEET EMAIL

Top WalkMe Alternatives Compared and Visualised

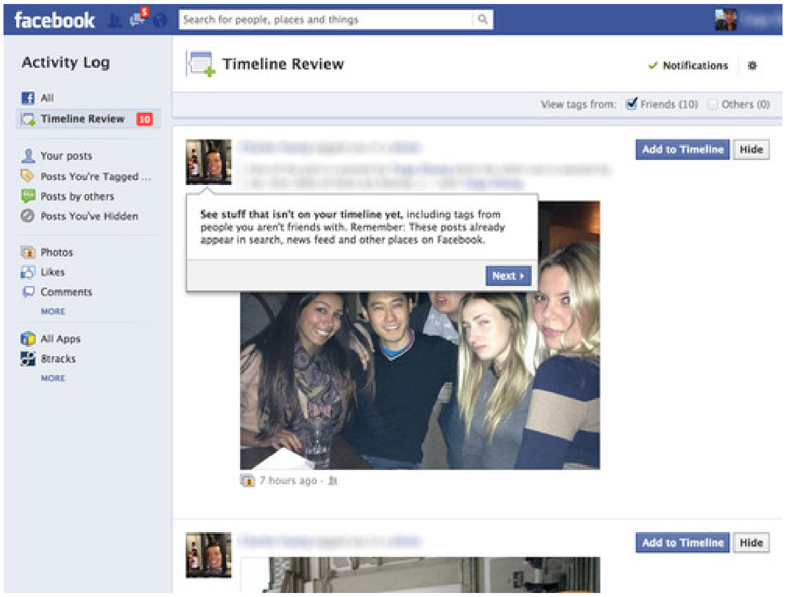
12 FEBRUARY 2013

The Interactive Onboarding & Learning Landscape

Product Tour videos are amazing at getting visitors excited (see our favourites). Video product tours aren't enough though. Once you have the user interested. What's next?

You onboard and educate them. You onboard them with images and a funnel. Use jQuery tours. Provide tooltips. Show them "how to" videos. You can even get them on an interactive tour.

Facebook jQuery tour:

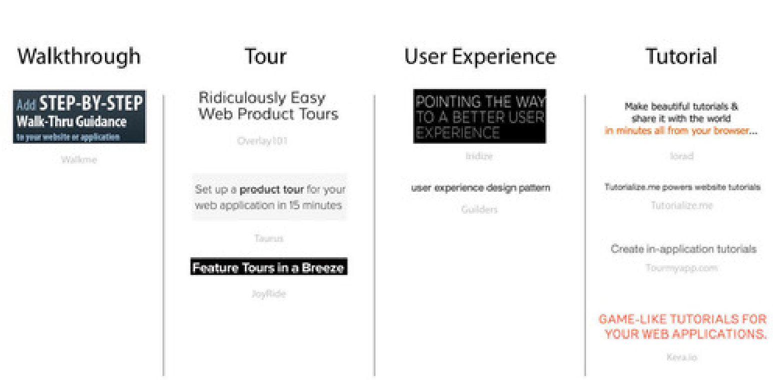


The Market & Categories

There is no clear market leader for Interactive Onboarding. Actually, this problem of conversion optimization is so nascent that there isn't even a real category for it. Is it marketing automation, customer success, or gamification? Seriously. Where does it fall?

If you're a product owner or UX designer trying to find a solution like us, good luck. You won't find it with a Google search. 100% of our customers found us through press and word of mouth. We don't do outbound sales.

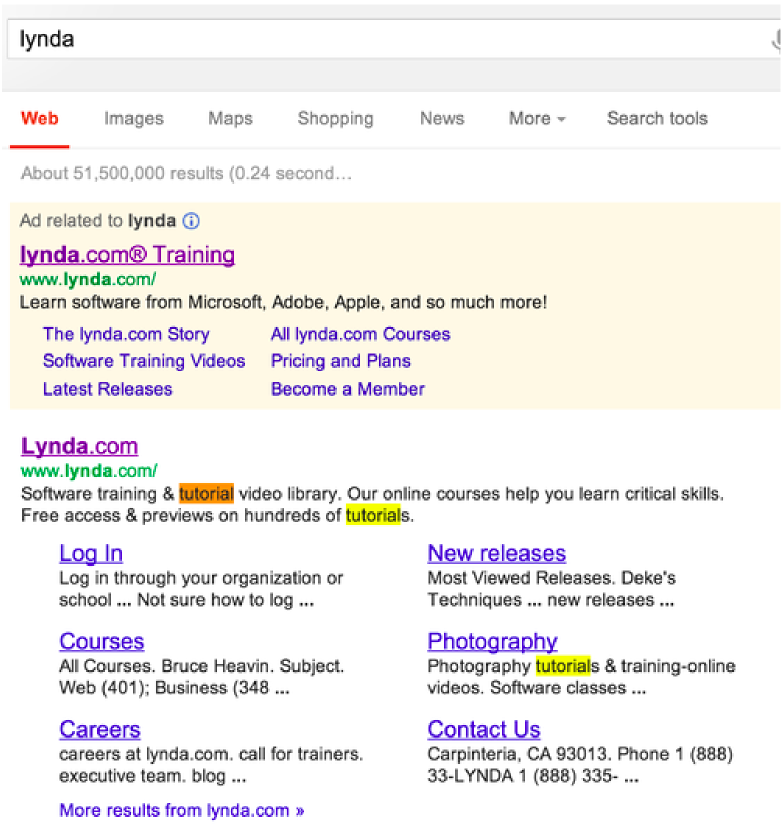
So what do our competitors call themselves and what keywords do they use?



There are 4 distinct keywords used: walkthrough, tour, user experience, and tutorial. WalkMe obviously uses walkthroughs. Overlay101 and their kin use tour. Iridize and their folks use user experience. We and our homies use tutorial.

Why Tutorials?

We use tutorial because it sounds active. A game tutorial is something that helps you learn the UI and game play, matching level to difficulty. Lynda is one of the best teaching and training platforms and they use the word tutorial.



A walkthrough is more of a demonstration and overview - "here, let me walk you through our website. Let me give you a tour." As opposed to tutorials where you learn something specific. Remember tutorial class in high school? I definitely do. It was awesome. (Good to know my high school hasn't changed their schedule much).

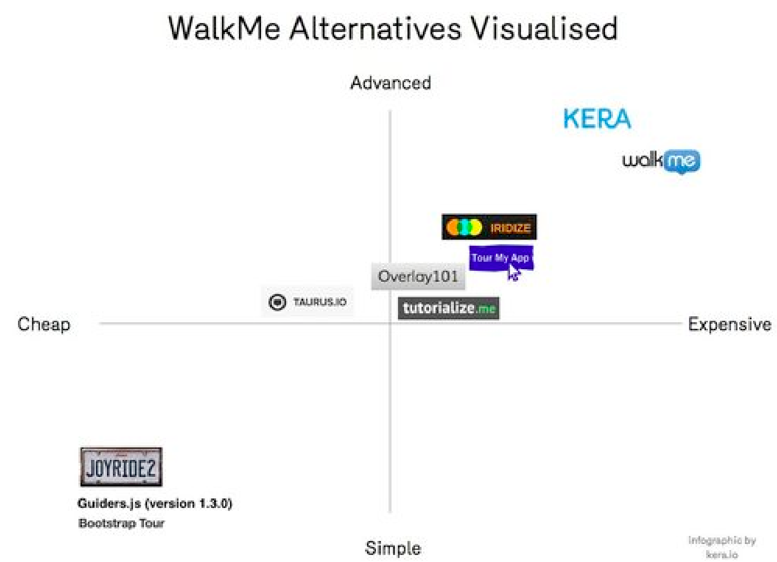
A walkthrough is more of a lecture where the professor talks and you try to take it in. Codecademy is a tutorial. This is a walkthrough.

That's why we're positioning ourselves as a tutorial company. We want to grow with the users. We give the user more advanced tasks as the user becomes more skilled. Not just introduce them to the UI and leave.

We're like Lynda for web apps but better.

WalkMe Alternatives and Competitors

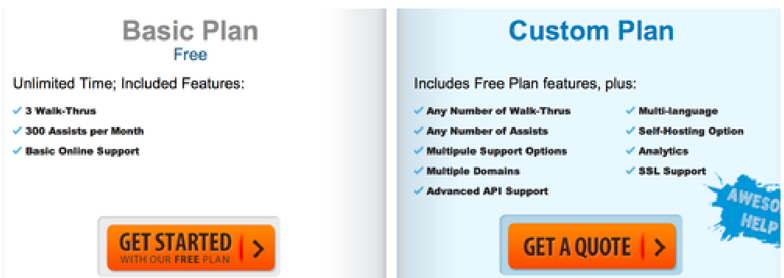
This is how the players in the market are distributed on a position map.



Pricing

WalkMe charges about $400 to over $4000 per month from what we've heard and may be considered the market leader having raised the most money and having started the earliest.

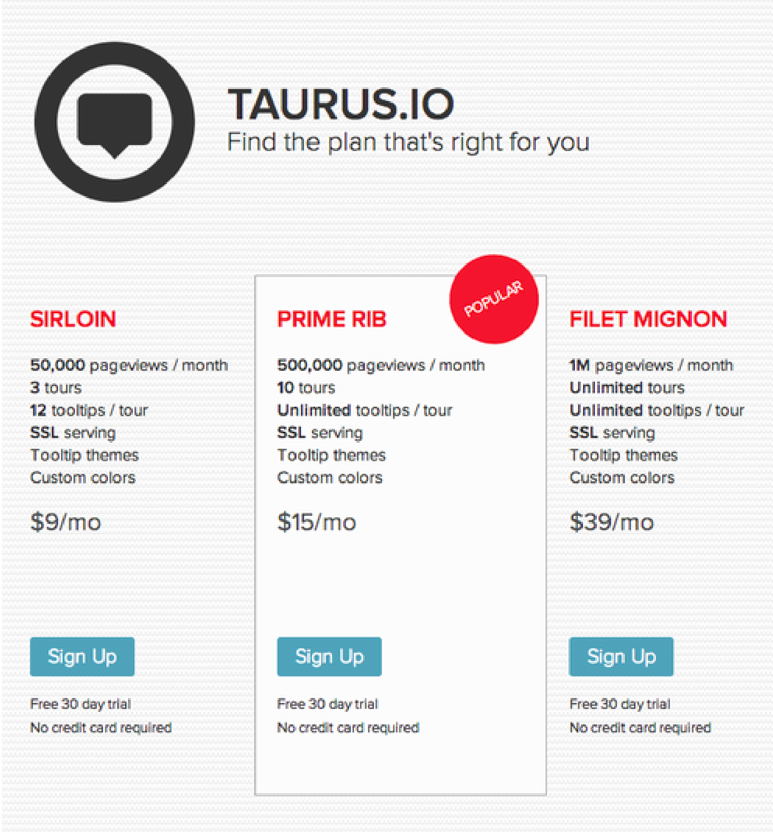
WalkMe Pricing



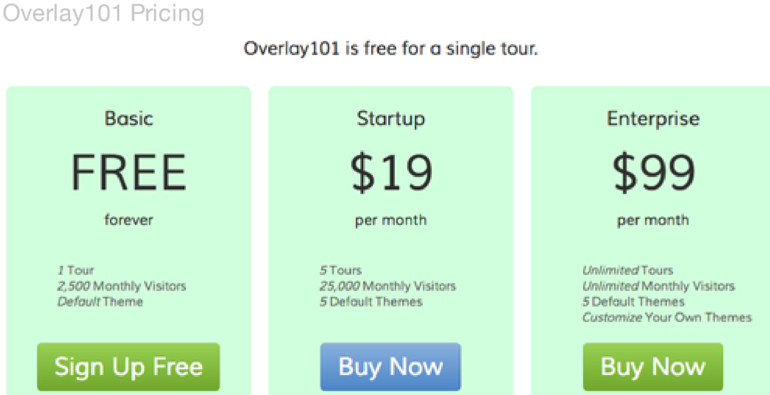
At the other end of the spectrum, there are free and open-source tools like Joyride. Basic jQuery tours. They require you to be able to code and be somewhat technical.

In the middle, you have easier to use versions of the open-sourced tools.

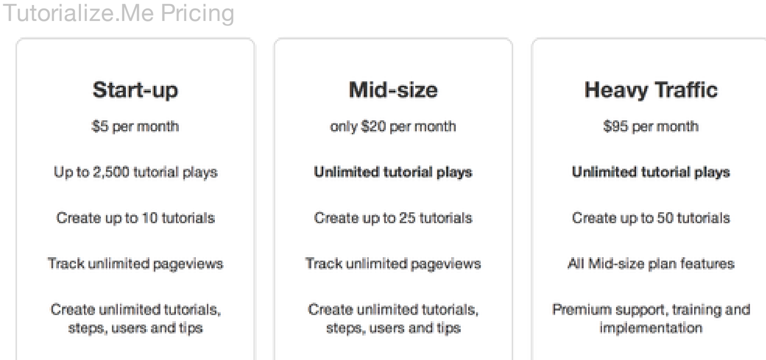
Taurus Pricing



Overlay101 Pricing



Tutorialize.Me Pricing



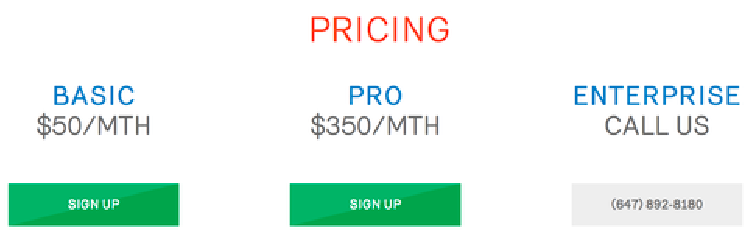
TourMyApp Pricing

Pricing & Sign Up

	Enterprise	Achiever $250 Monthly	Performer $75 Monthly	Starter $24 Monthly
# of Tours	Unlimited	Unlimited	Unlimited	Unlimited
Tour Runs	More than 50000 /month	50000 /month	10000 /month	1000 /month
Activity Stream	✔	✔	✔	✔
Funnel Analytics	✔	✔	✔	
Multilingual Tours	✔	✔		
Professional Services	✔ Available at $100 /hr	✔ Available at $100 /hr	✔ Available at $100 /hr	
Price	Contact us	$250 /month	$75 /month	$24 /month
	Contact us	Sign Up for FREE 30 Day Trial No credit card required. Choose plan later.		

We are positioned similarly to WalkMe. We're both market leaders in terms of our product and support. However, since we don't have the funding they have to do enterprise sales, we must compete on inbound marketing and product quality.

Kera Pricing

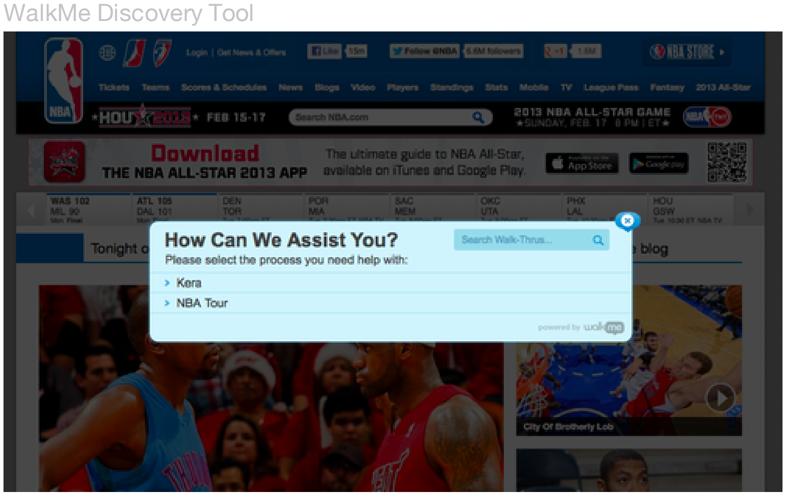


Let's take a look at what makes everyone different.

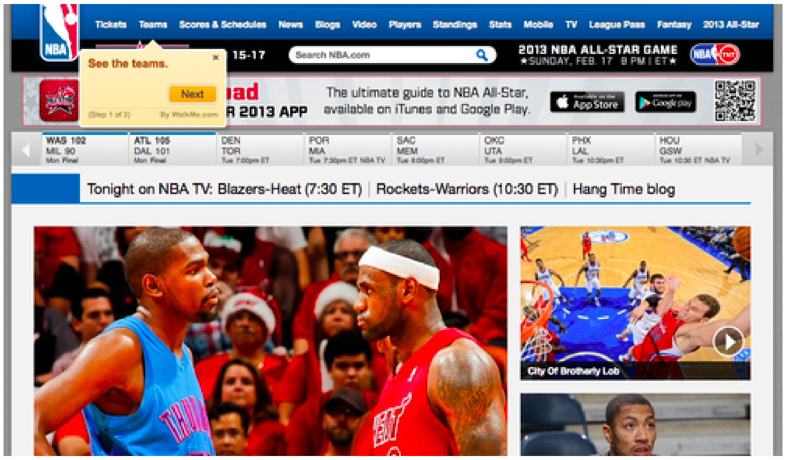
Features

WalkMe has a good editor for authoring and a nice discovery tool which allows you to see which walk-thrus are available to you. You can click on one to be walked through.

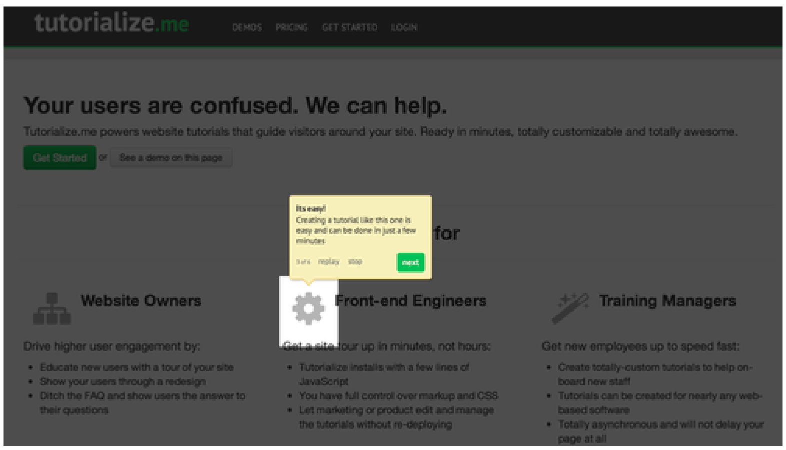
WalkMe Discovery Tool



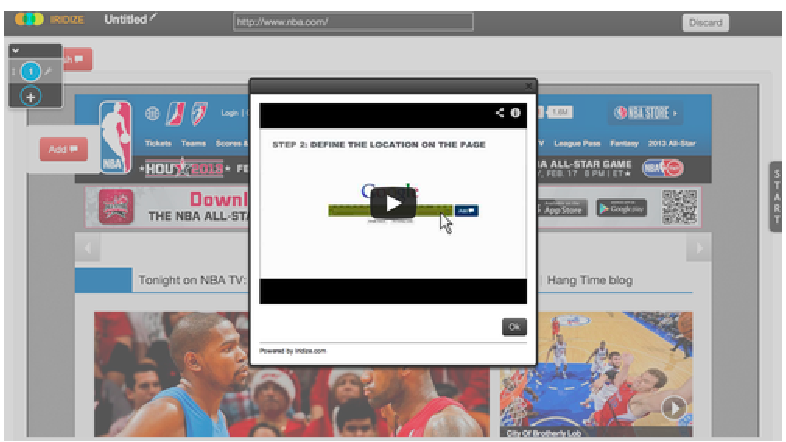
WalkMe Playback view.



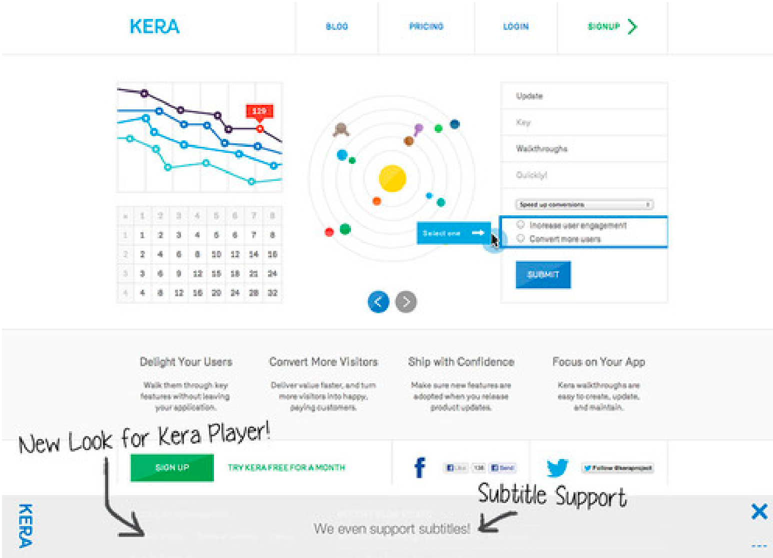
Tutorialize.me has an interesting playback. They darken the whole screen and spotlight on the particular item.



Iridize also does something cool. They allow you to add a splash modal to start the tutorial. You can use text or video.



Don't use this article as the definitive source for features of these companies because I'm sure they will come out with awesome new features and this will be out-dated very soon. I'm just illustrating how each of these onboarding tools offers something cool and different. Most of them have a free trial, so give them a try.



At Kera, we offer interactive tutorials that are voice-guided and completely interactive; meaning you can accomplish actual tasks in the application as you're learning. Just like game tutorials. There's nothing like this on the market. It's so immersive that people often refer to our tutorials as videos even though it's actually the live web application the user is seeing when they take our tutorials. See it for yourself at Kera.io

We understand audio is pretty expensive to produce so we facilitate step-by-step tutorials (SXST) too which use subtitles instead of audio. These tutorials are extremely quick to author. To work with us you need to apply.

Final Thoughts

We'd like to hear from you. What's the problem you're trying to solve? Who do you think does it well? How do you go about searching for us? How do you compare us? Which authoring experience do you love? Which playback experience do you love?

Taige from Kera.

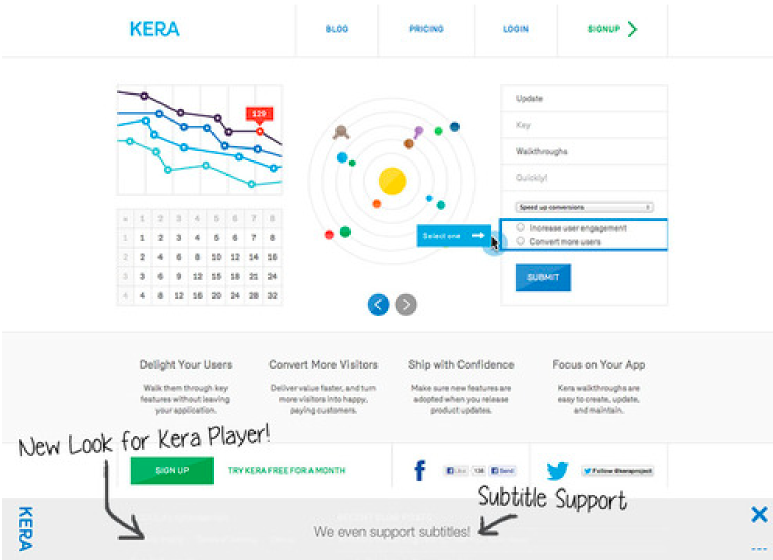
TWEET EMAIL

Kera Step-by-Step Product Walkthroughs have Arrived!

7 FEBRUARY 2013

Subtitles and Captioning.

Many of you wanted subtitles and captioning for your Kera tutorials…. it has arrived! You can now build step-based, subtitled tutorials without audio.



To see an example: go to the Kera homepage and find the word “maintain” and click on it. The secret step-by-step tutorial will start playing. Shortcut to homepage.

Our goal was to make it easier and faster for you to build walkthroughs. Now it can literally take 5 minutes to build and deploy a walkthrough. No audio required. Much better than making a video, huh?

How to build a step by step walkthrough?

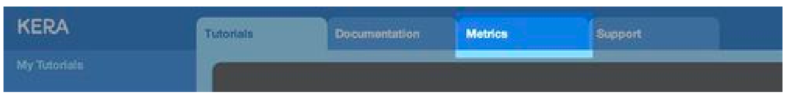
Use the “subtitle” attribute and don’t specify the time. This is the code for our secret hidden tutorial.

```
{
  "events": [
    { "type": "move", "path": "body", "subtitle":
"Hey buddy! Welcome to our \"Awesome Interactive\"
Tour. Click on the button to the right to continue."
},
    { "type": "move", "path": ".social_facebook",
"subtitle": "We have a Facebook page! Yay!" },
    { "type": "move", "path": ".social_twitter",
"subtitle": "And Twitter Bird! すばらしい!" },
    { "type": "eval_javascript", "eval": "
$('.carousel_nav.carousel_next.btn').attr('style',
function(i, style){ return
style.replace(/display[^;]+;?/g, ''); });",
"subtitle": "See what we can do." },
    { "type": "click_required", "path":
".carousel_nav.carousel_next.btn", "subtitle": "Try
clicking it." },
    { "type": "click_one_required", "path":
".demo_form fieldset input[name='radio']",
```

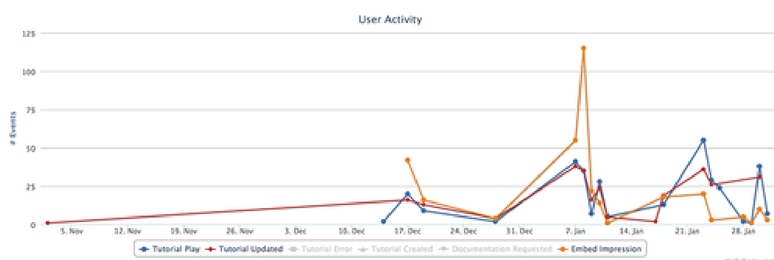
```
"subtitle": "What do you want?" },
    { "type": "click_required", "path":
"a:contains(Pricing)", "subtitle": "Now check out
our sweet pricing. Ok?" },
    { "type": "click_required", "path": "#pro-plan",
"subtitle": "We want you to click this." },
    { "type": "pause", "subtitle": "That's all. See
you soon!" }
  ]
}
```

More Good News!

We now offer core analytics! To see your account analytics, click on the metrics tab in your account.



This view gives an aggregate of your impressions and plays, among other metrics.



Final thoughts

We've been getting a lot of word of mouth referrals so thank you for following and supporting us. You've been amazing at telling your friends about us. This is a special month for us because we started charging customers and are really excited about our next stage of growth. We also changed our policy to require all new users to apply to work with Kera.

Please let us know what you think about our new features.

—-

Taige from Kera

TAGS: FEATURE RELEASE

TWEET

EMAIL

Gamification for Enterprise Web Applications

4 FEBRUARY 2013

Two weeks ago, I gave a talk at a B2B Marketing Group Meetup, BrainRider. It was about gamification in SaaS and enterprise businesses. Gamification is a hugely popular trend and is being incorporated in web applications of leading companies such as SAP, Adobe, and hot startups such as Codecademy to improve user engagement, productivity, loyalty, and ROI. How can you make your web application better by learning from great game design?

I'd like to share my presentation with you. There should be a video of it somewhere but I don't have it. So here's a summary.

Background

Taige Zhang is a product marketing manager at Kera.io, a Toronto based startup that offers the leading platform for building and deploying in-app tutorials for websites or applications. Before joining Kera, Taige worked as a social gaming product manager.

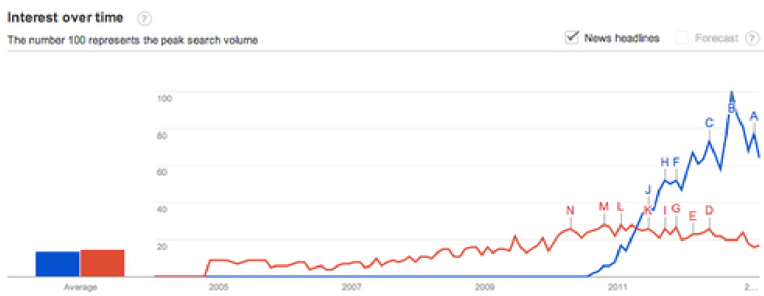
- Product Marketing Manager at Kera (Leading platform for interactive tutorials)
- Social Gaming Product Manager at Plinga (48+ Million MAU)
- Analyst at Apple and WPP

Gamification

Gamification is taking the mechanics of gaming to non-game activities to change people's behavior. It leverages our natural desire for competition, achievement, status, reward, self-expression and altruism. It is used to improve user engagement, retention, and ROI.

History

Google Trends: Interest over time



2007 Facebook apps start using game mechanics
2008 Social games fine tune game mechanics

2009 PMs start using gamification in consumer apps
2010 Badgeville launches Social games fine tune game mechanics
2011 Social Gaming Gamification Enterprise Adoption: Facebook apps
Oracle, SAP, Adobe, EMC, start using game Samsung, NBC, Deloitte,
mechanics Rogers, Bell, and eBay.

Gamification Growth

M2 Research estimates Gamification Market to be half billion dollar market in 2013. It's being used across industries such as Entertainment by Warner Brothers and Kiip; enterprise by Jive and EMC; education by Eduguide and Pearson; healthcare and wellness by Nike; media by Fox; and retail by Zappos.

Consumer Gamification Example

Gamification leverages our natural desire for competition, achievement,status, reward, self-expression and altruism.

1. Progress bar to encourage completion
2. Badges, trophies and achievements
3. Leader board
4. Customized profile for self-expression
5. Challenges and teamwork activities with other users
6. Explicit missions and goals for users
7. Tracking and rewarding user activities
8. Systems for awarding, redeeming, and exchanging points

Check out: http://success.adobe.com/microsites/levelup/index.html

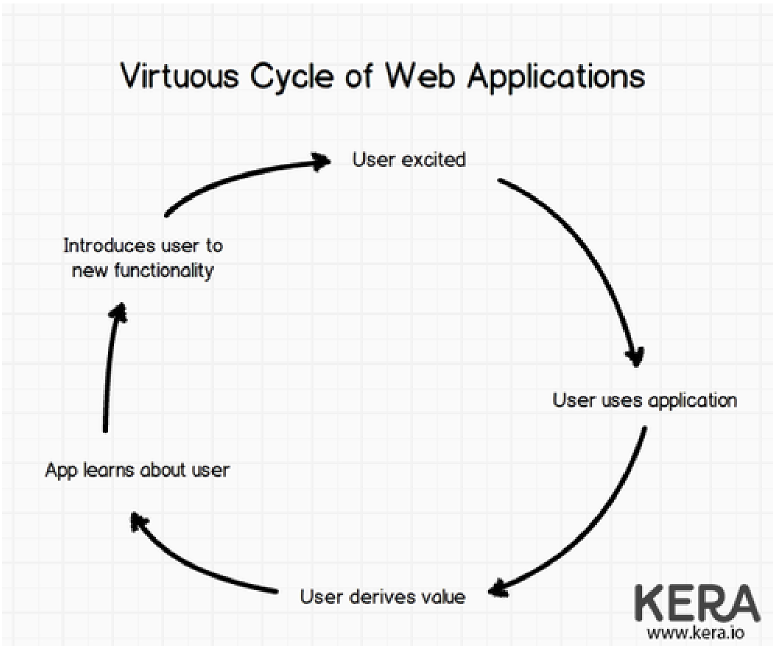
Enterprise Web Application Example

In late 2011, Salesforce.com acquired social performance platform provider Rypple, which uses gamification for employee performance and HR.

Results & Metrics Across Disciplines

Data in case studies on my shared gamification folder. Request access by contacting me @taigeair

Virtuous Cycle of Web Applications



The way a successful web application works is by 1.) exciting the user enough so the user decides to 2.) take action and use the web app. 3.) The user should derive value from using the application. 4.) The app must learn about the user through analytics and 5.) deliver new value to the user such as opening up new functionality, teaching user new things, and building new features. The loop continues with the user getting excited all over again.

You can use an agency or video producer to accomplish the first task of exciting the user through a video. Check out our Kera's Definitive List of Top 50 Best Product Tour Videos to see some brilliant videos and who made them.

You can use Kera (us!) to onboard the user and get them started with your application. When you go to a board game cafe, they often have people who will sit in for the first few rounds to teach you how to play a game. Kera's like that but for your web application.

Once the user knows how to play your game, it's up to the game to keep the user engaged and retained. You do that with great game design; and the easiest way you can do that is by leveraging game mechanics. Check out Badgeville or Bunchball.

Continued Learning

Here are some resources for gamification.

https://www.coursera.org/course/gamification
http://www.gsummit.com

http://marczewski.me.uk
http://www.enterprise-gamification.com

You can also contact me on twitter @taigeair to get access to my Gamification Shared Folder

Thanks!

Taige Zhang (Product Marketing at Kera)

—-

The original keynote.

« ‹ › »

Leveraging great game design for web applications (#torontob2b talk) from Taige Zhang

TAGS: LEVERAGING GREAT GAME DESIGN IN WEB APPS BLOG SERIES

TWEET EMAIL

Recruiting is like SEO

31 JANUARY 2013

Discuss on HN

At the highest level, there are three core components of a startup: product development, customer development, and team building. A lot of other founders ask us why we're able to hire awesome devs in a pretty competitive landscape.

The reason is that we treat recruiting like SEO instead of SEM.

SEM is all about bidding on keywords that yield high conversion rates. Once you figure out the right words, you just drop quarters in the top and customers come tumbling out the bottom.

But SEO is a slow-cooking stew. You start a blog, you pick your topics, and you start writing valuable articles that other people link to. It might take a year to build up your page rank and start paying dividends, but those dividends pay out for a lot longer, and generally result in higher value traffic.

Hiring awesome developers is much the same. You can drop serious coin on job boards, or even pay recruiters to find talent for you. But we've found that job boards are expensive, and result in a really painful screening process that yields very few good leads.

Instead, we take the slow road. We host Toronto's most popular JS meetup, and we attend as many tech events as possible. We work on open-source projects, and we write blog posts about stuff that matters to our community.

And when it comes time to hire people, we already have a list of people that like and trust us, admire the work we do, and understand exactly why they'd want to work here. It sure beats going through dozens of interviews filled with boring questions with a ton of people we've never met before.

What's worked for you?

- @maxcameron

TAGS: HR , TEAMBUILDING , TALENT

TWEET EMAIL

Kera's Definitive List of Top 50 Best Product Tour Videos

29 JANUARY 2013

It's the year 2013! But still, nothing on the web can create excitement and send a message like video. I think as businesses, we all realize the merits of having an explainer video or product video. They're amazing vehicles for your product and brand.

If you're an analytical person who wants to see some hard data, Kissmetrics found: Viewers are anywhere from 64-85% more likely to buy after watching a product video. And more data.

So let's make one!

The Quest

In our quest to find the best explanatory video production companies, we did some research to see who was making all these great videos for big and small companies alike. In our research, we found there are a lot of small video production shops that can get the job done, but only a handful of them are in the premier leagues. You'll find them listed here.

If you want to play in the pens of Apple and AirBnB, you might want to check out who made their videos and get in touch. (Credits shown under each video.) If cost is an issue, find a company that can make the style you're looking for, whether it's stop motion, animation, hand-drawn, or live action. There are lots and lots of them.

You can find a local one by searching on Google. For example, check out the Common Craft Explainer Video Network. They helped Dropbox.

Another thing I noticed is almost all explainer videos are hosted on Vimeo and/or YouTube; now Wista is getting quite popular. Some companies like Facebook and GoInstant use Amazon, Akamai, or VidYard.

In Part 2, you'll find videos 26-50 and resources on how to make your own explainer videos.

This content is fully accurate as of Jan 30th, 2013.

Kera's Top 50 Product Overview Explainer Videos
Part 1 | Part 2

The Top 1-25

1. Google Wallet (Concept Video and How It Works Video)

Who made it: http://planetnutshell.com

Who made it: http://www.rga.com and http://akjak.com
The campaign won quite a few awards including a Webby.

2. Foursquare Concept Video

Who made it: http://nicholasbrave.com
It's awesome. Watch it. Full Screen.

3. Dropbox Explainer Video

Who made it: http://www.commoncraft.com
They talk about its success here.

4. AirBnB Welcome Video

Who made it: http://sandwichvideo.com
She’s just chilling. Read the discussion about this video on Quora.

5. Spotify iPad Product Video

Works with: http://www.identityworks.se
Who made it: Johannes Ring (In-House)
Great use of music. Obviously.

6. Dollar Shave Club Welcome Video

Who made it: http://paulilu.com
This is funny shit. Viral.

7. CrazyEgg Explainer Video

Who made it: http://duckdemo.com

8. Square Product Video

Who made it: http://sandwichvideo.com

9. Apple iPad Product Video

Who made it: http://tbwachiatday.com

10. Venmo Concept Video

Who made it: http://tjwalthall.com

11. Box Intro & Crunchies Video

Who made it: http://transvideo.com

12. Facebook Like Explanatory Video

Who made it: http://www.epipheo.com

13. PadMapper

Who made it: http://grumomedia.com

14. Mint Web Product Overview Video

Who made it: http://transvideo.com

15. Trello Product Overview Video

Who made it: In-house?

16. Hipmunk Hotels Launch Video

Who made it: http://grumomedia.com

17. SkyDrive How It Works Video

Who made it: http://planetnutshell.com

18. Google (Chrome OS) Concept Video

Who made it: http://www.epipheo.com

19. Klout Explainer Video

Who made it: In-house?

20. Amazon Cloud Drive Intro Video

Who made it: http://www.epipheo.com

21. Google (Google Plus) Product Video

Who made it: http://www.epipheo.com

22. Trulia iPhone Demo Video

Who made it: http://www.demoduck.com

23. SendGrid Product Tour Video

Who made it: http://www.revolution-productions.com

25. GoInstant Product Tour Video

Who made it: http://www.launchsparkvideo.com

Honourable mentions:

These guys also have nice videos but they didn’t make the top 25 list this time.
http://explainify.com
http://www.lilipip.com
http://www.switchvideo.com
http://thinkmojo.net

See the Top 26-50 videos in our Part 2.

More videos and discussion:

Quora: What are some good examples of startup product demo videos, and who made them?

Quora: Who are the top “explainer” video production houses? Why?

Startup Videos: Showcasing The Best Startup Videos

You should subscribe to Kera for more UX and onboarding tips or follow us on Twitter @keraproject

—-

Taige Zhang (Product Marketing at Kera)
Follow me on Twitter @taigeair

TAGS: PRODUCT TOUR VIDEOS

TWEET EMAIL

User Engagement Advice from a Behavioral Neuroscientist, a Googler, and a Design Professor

22 JANUARY 2013

**Part of Leveraging Great Game Design in Web Apps Blog Series

I've picked out 3 important lectures by some of the smartest people in the interaction design vertical for web onboarding and user engagement. If you're interested in gamification and user experience for your web application, this is highly recommended reading!

1. The Neurosciencist

Amy Kim is the CEO of ShuffleBrain, a game design studio that designs puzzles and games for a variety of industries from business to education. She holds a P.hD in Behavioral Neuroscience and has worked for eBay, Netflix, eBay, and NASA.

This is her influential presentation on "Designing the Player Journey".

Follow her on Slideshare or check out her about.me profile.

2. The Googler

Nadya Direkova is a Senior UX Designer and Game Mechanic at Google. She also holds a M.S. degree from M.I.T. and B.A. from Amherst College.

This is her talk about "16 Design Patterns for User Engagement".

« ‹ › »

Follow her on Slideshare or check out her website.

Or watch the video if you have time:

3. The Design Professor

Chris Risdon is an experience designer working at Adaptive Path and a professor at Austin Center for Design.

This is his keynote about “Applying Behavior Design”.

« ‹ › »

Follow Chris Risdon on SlideShare or check out his website.

— Written by Taige Zhang

TWEET EMAIL

Web Apps Onboarding: How to Treat Your New Users

19 JANUARY 2013

**Part of Leveraging Great Game Design in Web Apps Blog Series

— Discuss on Hacker News —

There has been some discussion about the need for tutorials and onboarding in web applications. For example, see If you see a UI walkthrough, they blew it or Rethinking The Mobile App "Walkthrough" or In Defense Of The Humble App Walkthrough. Simple web application onboarding is relatively established but more in-depth ones are nascent. Are they needed?

Here are the facts…

1. Onboarding Experience Needs to Fit the Complexity of the Application

Research from E. Andersen, et al. from Dept. of Computer Science and Engineering at University of Washington found, one size does not fit all. The onboarding process for simple apps and games, should be non-existent or minimal.

Abstract from [The Impact of Tutorials on Games of Varying Complexity]:

> One of the key challenges of video game design is teaching new players how to play. Although game developers frequently use tutorials to teach game mechanics, little is known about how tutorials affect game learnability and player engagement. Seeking to estimate this value, we implemented eight tutorial designs in three video games of varying complexity and evaluated their effects on player engagement and retention. The results of our multivariate study of over 45,000 players show that the usefulness of tutorials depends greatly on game complexity. Although tutorials increased play time by as much as 29% in the most

> complex game, they did not significantly improve player engagement in the two simpler games. Our results suggest that investment in tutorials may not be justified for games with mechanics that can be discovered through experimentation.

If your web application is simple, you really shouldn't have to create a walkthrough. How about if it isn't?

2. Test your assumptions

We reached out to Stephanie Kaiser, Head of Studio at Wooga, one of the gaming industry's thought leaders on building successful games. Wooga is extremely respected for their metrics driven game design process. Luckily, they also have 50 million monthly active players to test with.

I asked her if she has ever tested just putting a user straight into a game vs. giving them a tutorial first?

Stephanie Kaiser:

> Yes we have. In fact we tested it with several different A/B tests as well as with (it feels like) hundreds of user tests. Again, for a casual game such as Monster World, the tutorial we built was absolutely necessary. We had a version, where there was no tutorial whatsoever and I saw so many people failing on the game. Oh dear, that was painful. Having the tutorial in as it is today, I saw a lot of "non-gamers" succeeding in the tutorial, feeling rewarded for that matter and being engaged by that.

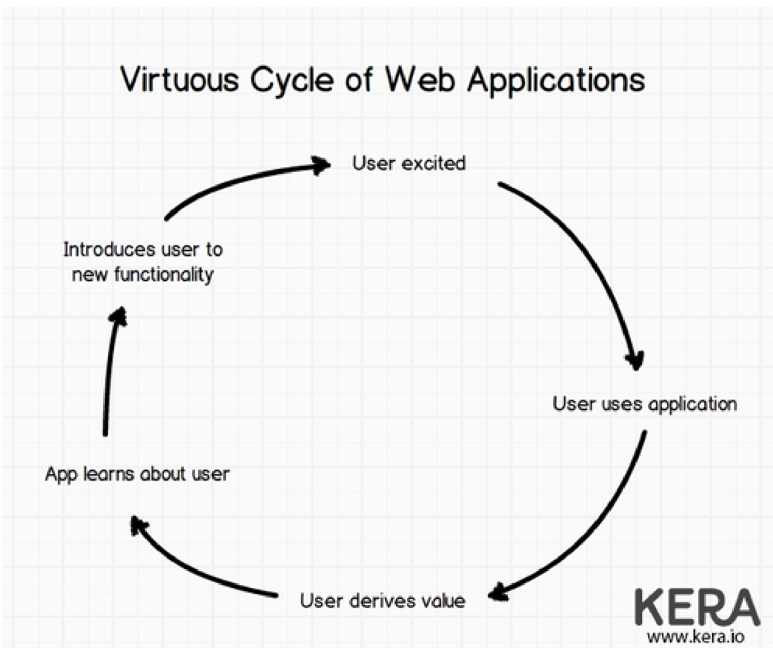
UX designers and product managers need to understand their users and test. For example, Stephanie believes tutorials may not be needed for hardcore players: “Some people might not like the fact that they are forced into certain actions. I cannot judge on it. I can only talk about the casual games that we produce.” It’s up to the product owner to test and decide how to capture early engagement.

3. The onboarding experience should be engaging

As a product manager or UX designer of a web application you have many tools available including video, tooltips, and even interactive walkthrough (as seen on our homepage).

The important thing is to keep your users engaged during the process. Videos are great for creating excitement and building emotions. Gamification is a powerful way to influence user behaviour. And tutorials are a great way to guide the user to quickly discover the value of what your application can do if it’s not self evident.

I created a model to show how a successful web application works. It’s called the “Virtuous Cycle of Web Applications”.



Fred Wilson expands more on this idea in his famous 10 Golden Principles of Successful Web Apps video. The bottom line is to make your onboarding process as fun and seamless as possible. Learn from game designers.

Take a look at this brillant critique of how Mega Man deftly onboards users.

Next: Stay tuned and subscribe for my next post: “Game Designers’ Secrets on Getting New Players to Learn Long, Complex, and Difficult Games”

—Written by Taige Zhang (@taigeair)

TWEET EMAIL

How To Fix a Crappy Conversion Rate

16 JANUARY 2013

Discuss on HackerNews

The Problem

We’re an early stage startup searching for product market fit. We built our MVP and released it to the public in September of 2012, and people started finding our site and sharing it with others via email and hackernews.

It seemed that people were really interested in Kera and we’ve been getting a fair amount of signups. All of our advisors and investors pressured us to keep driving those numbers, and we thought we were on the road to early retirement. After all, 50% month over month signup growth for a B2B SaaS company is pretty awesome.

The point is we weren’t converting many of our signups into customers. Unfortunately for us, we fell victim to a vanity metric. The worst part is, we chalked it up to deficiencies in our product instead of looking for more effective answers.

The Cause

After a lot of reflection, the big reason our conversion rate sucked was that too many different types of customers were signing up for Kera. There were the tire-kickers who just wanted to take a peek at our UI and UX. There were the late adopters who took three months to make a buying decision. Most of all, there were a lot of signups who just hadn't felt enough of the pain that we solve.

After all, if you expect people to pay for an MVP with a ton of missing features - you need to find the people who hate their current alternative with a passion.

The Results

As a result, our attention was spread very thin. Learning from too many customer types meant that our product roadmap informed by inconsistent feedback. We started building features that only a small portion of our customer base really needed.

Worst of all, we were providing crappy service to too many people - oftentimes people that never intended to become customers in the first place. What a waste.

Our Solution

The first thing we did was start gathering criteria about our successful customers. What were the characteristics of the companies that adopted our software quickly? We looked for patterns and started building a persona of our ideal customer.

The next step is asking our website visitors to self-select. We're using a google form to gather information about the companies that want to use our software. This isn't because we want to sell to enterprises, and we don't think it takes the "touchless conversion" off the table.

Expected Results

We're expecting our signups to take a big hit, perhaps as much as 80%. Our hope is that loss will be made up of tire-kickers, late adopters, and companies who haven't felt enough pain. In other words, companies that never intended to become customers in the first place.

And because our signups will decrease, we also expect to see a boost in our conversion rate from trial to paid. And since we'll be working with ideal customers, I expect a clearer picture of what features we need to add and remove from Kera in order to keep improving our metrics.

And finally, I'm expecting to create a small army of delighted, paying customers.

Have any of you tackled this issue in the past? What's worked? What hasn't?

- @maxcameron

TWEET EMAIL

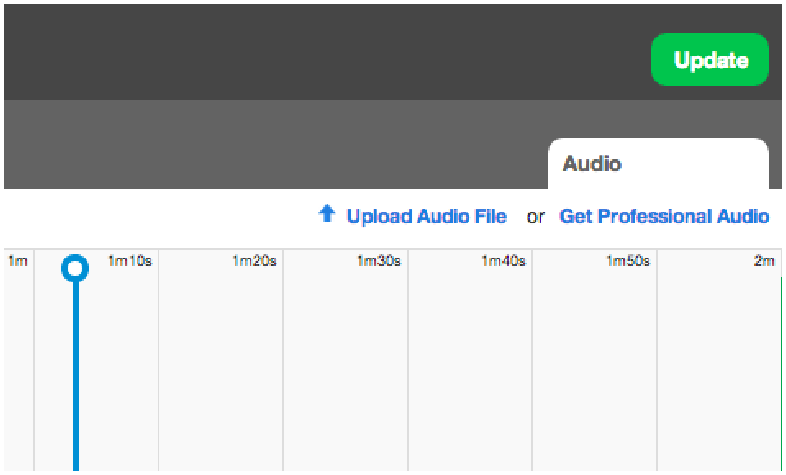
Getting Professional Audio For Your Videos and Tutorials

10 JANUARY 2013

VoiceBunny is a service that allows you to get professional voiceovers for your "how-it-works" or explainer videos, games, tutorials, etc. You give VoiceBunny a voiceover script and they will get professional voice actors to create the audio file.

At Kera, our product allows people to create and deploy in-app tutorials for their web application. Sometimes the people making tutorials aren't comfortable with using their own voice or it doesn't reflect the brand appropriately - this creates a lot of problems for our users.

So we decided to make it easier for our users to get access to professional voices and contacted VoiceBunny. They told us about their new program for integration: co-branded sites. Guess what? Now we have a button on our tutorial editor which helps users get started with creating professional audio.



On Kera you can upload your own audio or get professional audio using VoiceBunny.

VoiceBunny Co-Branded Site - Easy to Set Up, Fast

This is what we use right now. There's no work required from us. Contact VoiceBunny and tell them you want to have a co-branded site. They will build a branded version of VoiceBunny for you and give you the link. Simply link to that page from your site. It looks like this, VoiceBunny and Kera Co-Branded Site.

The benefit is it doesn't require any development time from you and you get a small commission from the project. The downside is your users need to sign up for VoiceBunny and must leave your application to get professional audio.

VoiceBunny API - No sign up required for user, powerful

We'd like to do this but it's not a top priority at the moment so we went with the co-branded site. If we used their API, we would be able to have the user post voice projects directly within our application and we would handle charging the user (or bundle it in our monthly fee).

I reached out to Tara from VoiceBunny to get some examples of companies who use the VoiceBunny API:

Vungle - helps mobile application developers promote and monetize their apps through in-app video trailers.

Spreaker - allows anyone to create, broadcast and share a personal live podcast online.

We're really thankful for VoiceBunny's service as it makes it a lot easier for our users. If you're one of our users and would like some tips on how to create a great VoiceBunny project, read this article. And if you're a company looking to see how to work with VoiceBunny, see their partnership page.

— Written by Taige Zhang (@taigeair)

TWEET

EMAIL

Friendly Reminders While Crafting an Onboarding Experience

8 JANUARY 2013

- Discuss on Hacker News -

Editor's Note: This is a guest post by Susan Lin, a Visual UX Designer currently at Trulia in San Francisco. In addition to crafting designs, she also posts sketchnotes of various talks from the tech and design world. Say hi @bysusanlin.

When will your target audience wish for your product?

They say the best way to discover a start-up idea isn't to seek it, but rather, live it. Words of Paul Graham also dictate if it's a problem you're having yourself (and even better, willing to pay for it yourself), you're onto something.

The first pass at onboarding comes before the moment your user even sees your landing page – where can you insert yourself in that moment?

"Has someone already written a library or made a service where I could make an inline tutorial?" Ensure you're at the top of the search results, or the first breath of a word-of-mouth recommendation.

Charm them

What makes you different? How do you strike the first impression?

In the case of a start-up, one has to prioritize work, but don't make the mistake of underpriotizing your landing page, the one meant to net your users. There's a lot under the hood in the first impression. Do whatever you can to make the page attractive, looks matter.

Don't lose them

Over deliver. Engage with your first users and treat them well. Listen to their suggestions. Reassure improvements are underway and will be fulfilled. Your first users are precious. They're there because they already believe such a product should exist.

Keep on looking outwards

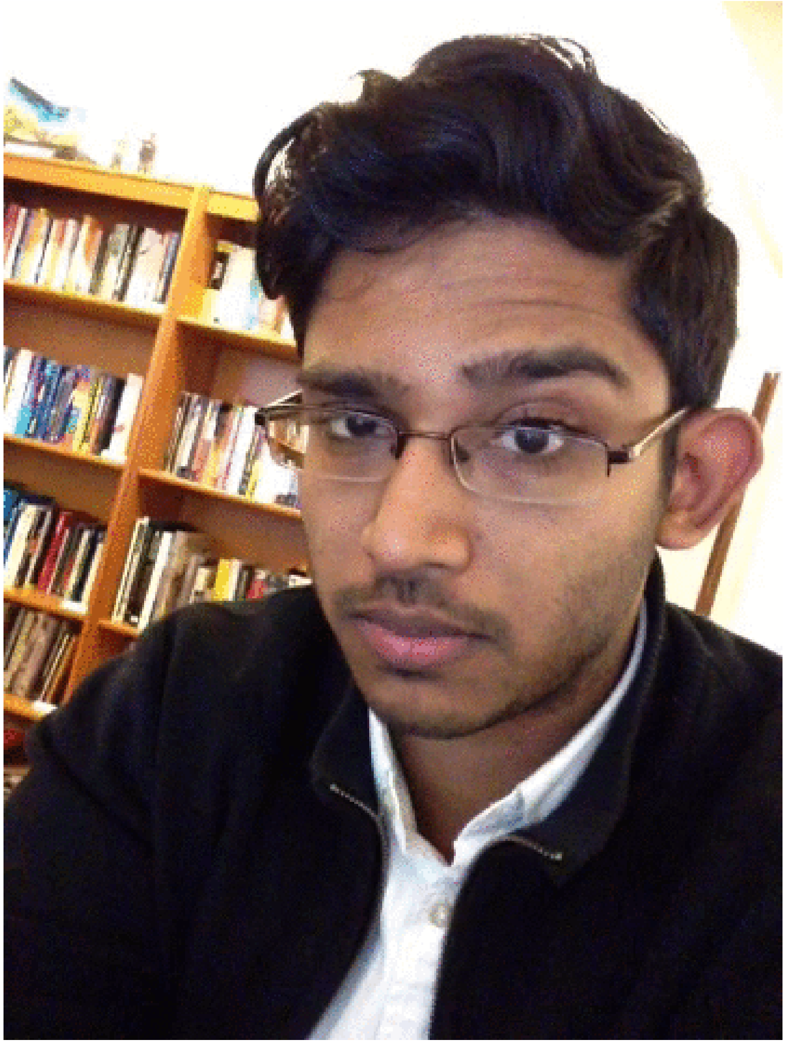
These reminders are all about looking inwards and refining your product, but don't forget to look outwards. Keep a sharp eye out for patterns others are employing. Keep a growing list of the rememberable ones.

Note: These opinons are my own and not of my employer.

TWEET EMAIL

Christopher Mudiappahpillai is a Keranaut!

7 JANUARY 2013



Chris is going to be working on a little bit of everything at Kera: front-end development, operations, admin, snack purchasing, Christmas Tree removal, bio writing…The list goes on and on. He's your typical

JACK-OF-ALL-TRADES-MASTER-OF-NONE

renaissance man.

Chris's favourite things to do when not working are taking pictures, breaking web forms with his last name, and buying gadgets to fill the void in his life.

You can find him on Twitter, Flickr, and yes, even Github.

- Christopher (@mud)

TWEET EMAIL

Five Principles for Effective UI Walkthroughs

2 JANUARY 2013

Discussion on Hacker News

There's a really interesting conversation happening right now about UI walkthroughs in mobile applications that has caught the attention of the community at large. Max Rudberg kicked off the conversation arguing that walkthroughs are frustrating, ineffective, and an indicator of serious design flaws. The Hacker News comments are worth a read as well.

Jeremy Olson asked the question, Are UI walkthroughs evil? and even TechCrunch jumped in with a few choice comments.

Rudberg effectively criticizes a specific way of implementing a walkthrough, but misses a more interesting conversation. I think it would be useful, though, to define exactly what a walkthrough is first.

At Kera, we define a UI Walkthrough as the process of intentionally revealing functionality to a user. This is a broad definition, but that is intentional. Because there are many ways to walk a user through a piece of software. Rudberg takes a stab at one approach - the "slideshow," where an end-user is presented with a series of panes showing the application in various states before they get started.

> A UI Walkthrough as the process of intentionally revealing functionality to a user.

But we believe that UI walkthroughs have the opportunity to be incredibly effective when designed with care. When a walkthrough is well-designed, it doesn't feel like UI Walkthroughs at all - it becomes invisible, and part of the core user experience.

So far we've identified five principles of walkthrough design:

Context

The spectrum runs from completely separated from the UX (slideshow, youtube video, document, etc) to completely integrated into the UX (hint, reveal, in-app message, etc). Our position is that UI walkthroughs should be as integrated as possible into the application.

Presence

The spectrum ranges from ever-present (help menu or a visual hint that never disappears) to just-in-time (revealing functionality only when needed). We believe that walkthroughs should be presented to a user at precisely the time they need it. Either by exposing them intelligently, or by allowing them to be searched.

Choice

The spectrum ranges from completely optional (would you like help now?) to completely mandatory (complete this walkthrough to unlock level 2). Studies from the video game industry show that mandatory walkthroughs are much more effective than their optional counterparts.

Intent

The spectrum ranges from revealing the location of buttons or sections (a "tour" for the lack of a better term), to exposing a specific workflow. When I sign up for a new service, I don't want "this is where your settings button is" as much as I want "let's update your profile photo."

Temporality

The spectrum ranges from completely synchronous (our friends at GoInstant have written a great piece about this), all the way to highly scalable asynchronous solutions like Kera. Our position is that synchronous solutions are fine while discovering the best way to onboard, which can then be replaced by a more scalable solution.

Final Thoughts

We think if you take the time to design a UI walkthrough that takes advantages of these principles, they'll be more successful, and they won't offend people who take design seriously.

Going back to the Rudberg article - I don't think he has a problem with intentionally revealing functionality to the user. In fact he endorses a more sophisticated style of walkthrough (the hint). He simply (and correctly) critiques lazy walkthroughs that are tacked on as an afterthought, as opposed to becoming part of the core UX.

Ultimately, I'm happy he and others like him have brought this conversation into the forefront. Now it's up to the rest of us to push it forward.

You can find me on twitter @maxcameron

TWEET EMAIL

Fake Doors: Bait for Quick Feature Validation

20 DECEMBER 2012

With a few big releases thrown back on ice, the Kera team is back to some quick experiments.

We're following the same plan you already –hopefully– know pretty well: build quickly, measure accurately, learn and respond. I'm onboard. Full steam ahead. But, of course, I still have a few concerns. I worry that bad data might be generated through some of our experiments simply because of how the stage is set.

What if a user neglects or dismisses a new experiment because of how it's framed or presented? While some experiments are best released rough and transparent, others might demand a more convincing veneer. Choose your experimental approaches carefully and make sure you're clear on what you're seeking to validate.

If your experiment is workflow related, and you're testing how a family of components and your users will interact, you will probably need to build a rough, but reasonably complete user experience.

On the other hand, if your experiment seeks only to prove whether a new feature is actually going to be of interest, a fake door might be all you really need.

A fake door is nothing more than a convincing call-to-action that leads to no real feature or event. It's a painless trick to gauge interest before committing any real resources. When using this approach be sure to give your users fair feedback on the other side. A simple "thanks for your interest, we'll keep you updated" is often enough.

TWEET EMAIL

We're hiring a Web Designer

18 DECEMBER 2012

Hey folks,

Wanted to throw this out there. If you're looking to join our growing team and you've got design skills on the front end, check out our latest job posting:

http://kera.mytribehr.com/careers/view/1

-Cameron

TWEET EMAIL

The Founder Shuffle

18 DECEMBER 2012

Discuss on Hacker News

Roles for Startup Founders

It’s hard for founders to know what their true role is in an early-stage startup. I find this interesting because while people are comfortable with the ambiguity around a nascent business model, the roles that founders take seem to be set in stone from day one.

It’s easy to become trapped by these early decisions because once you define who is responsible for what, momentum sets in and roles solidify. But sometimes you have to do hard things (make changes) to give your business the highest chance to succeed.

> The pivot applies to more than a product and a market. A founding team can pivot too.

The Typical Setup

At Kera, we have three founders: one of us is technical, one of us specializes in design, and my background is in product management. When we entered our accelerator, one of the first things we were asked to do was decide who would be the CEO.

We thought Cam (developer) and Jon (designer) could handle product management for the time being. More importantly, I’m the one responsible for sales and customer development - and fundraising is a sales process. And besides, I’m the least technical of the three, so of course I should be the CEO.

Duh.

Fundraising Issues

But there’s a problem with the (obvious) approach we took. If you’re building a product that has a significant technical risk associated with it, the due diligence process will always include a technical component. I’m not technically illiterate, but my knowledge has its limits. And as a result, I was forced to distract our product team from their duties to take a bunch of meetings.

We broke the cardinal rule of fundraising:

> Thou shalt put up a firewall and protect the rest of the team from the fundraising process.

The Team Pivot

A few weeks into it, we sat down as a team and took stock of the situation. Fundraising was going well, but we were starting to stall on product. Furthermore, we had basically abandoned customer development experiments and were going heads down on a massive release.

We were getting the worst of both worlds - half-hearted product development with an emphasis on building, rather than learning. So we decided to make a change. Cameron would take control of the fundraising process, and I would go back to product.

We then had two main objectives: put a fundraising firewall in place, and validate the release we wanted to build before we go heads down on a huge project.

Don't Feel Bad

We're a small company. Titles aren't important for us yet. We know what we're good at, but there's a lot of discovery that needs to happen before anything gets set in stone.

Being a lean startup is about learning quickly and experimenting to find the best results. But lean isn't restricted to the scribbles on a business model canvas. Sometimes change can feel personal. But our job is to do what's best for our business, not our egos.

If you liked this article you should follow me on twitter.

TWEET EMAIL

Visual Design in a Lean Startup

13 DECEMBER 2012

Discuss on HN

This past Tuesday, Kera compadre, Dave, shared some great perspectives on how to keep engineers happy in a Lean startup. It's worth mentioning that designers face a different kind of challenge. One that isn't discussed nearly as often.

I wear a few hats at Kera, but I'm a designer first. As an interaction designer, the methods behind agile and lean are far from new. Proper interaction design demands a quick, iterative approach with lots of dirty experiments, no problem. But for visual designers the rules are often different.

A good visual designer craves big challenges. And designers want to create the entire solution. Ideally, every project goes out to the masses pixel-perfect and ready to live on in portfolios without the chance of future regret.

But how does a piece of visual design work go from raw idea to public release? In teams or as individuals, designers experiment all the time. However, these rapid experiments most often happen "behind the curtain" with the same teams or individuals.

So, what if a spree of lean experiments with the rest of your product team is actually the best way to test and validate those different approaches to tone, layout, colour and type. I know you have a bunch of different approaches that you're playing with. Why not just try all the promising ones through different product iterations and measure what's most successful. Give your idea a small audience and some room to breathe and you'll be surprised by what you learn.

For most, this article probably isn't enough to solve the lean creative crisis. If you're still haunted by the spectre of mediocre creative going out to the wild, there are a few compromises that could help. A good example might be to keep your visual designs quick and messy through product iterations on the inside while flexing all of your creative muscles on smaller outside projects (marketing collateral and other expressions of the brand).

While it might be difficult, we believe delaying perfection in favour of experimentation will serve us well in the long run. Our creative will make a lot more sense to everyone as it changes organically. Great design will never be an afterthought - it will grow with our business.

Consider this: What did Twitter look like in 2009?

- Jon Friis

TWEET EMAIL

Product Managers: How to Get Your Engineers to Love Being Lean

11 DECEMBER 2012

Like most city dwellers, I'm often a quick judge on how well the city allocates its resources. Anyone who's waited 20 minutes for an every-5-minutes bus has probably praised themselves on how well they could run things if given the chance.

But a former mayor helped change my tune. He once invited city residents to try and balance the budget themselves. His team laid out everything that needed to be paid for, factoring in raises, community services, emergency services, future growth and expansion. As you probably guessed, the exercise is designed to be difficult. It's hard to keep everybody happy with limited resources. You quickly learned that sacrifices need to be made in order to avoid running a deficit.

Unfortunately, doubling the mass transit budget isn't really an option unless you and every resident wants to pay for it (good luck with that).

It turns out I learned this lesson again in a different context when I first started working as an engineer in a lean startup.

It's a natural inclination for most software engineers to optimize and perfect any bit of code they work on. For them, it's a work of art upon which they will be judged. So a lean product manager telling an engineer that their work so far is "good enough" can feel like a shot through the heart. They may not be your biggest fan.

The trick is to give them a bigger optimization problem. Open up your books and show them what you have to work with. You have X developers and Y weeks. These are the Z problems we have to solve by Friday. How can we best solve them?

It's even better if you can entirely open up your books to the revenue streams and expenses that keep your office running and your engineers paid.

Now they have an even more complex problem to work with. How can they churn out quality code *and* accomplish everything that needs to be accomplished *and* take home a paycheque at the end of the month?

Show them your job is more than just saying "do this" and "no". Involve them in client meetings so they can feel the same heat you do. If you allow them to optimize against the resources given, they'll begin to work with you instead of against you.

- Dave Wright (@datwright)

If you've had any similar experiences changing your relationship with your product manager or engineer I'd love you hear your story on HN.

— Discuss on Hacker News —

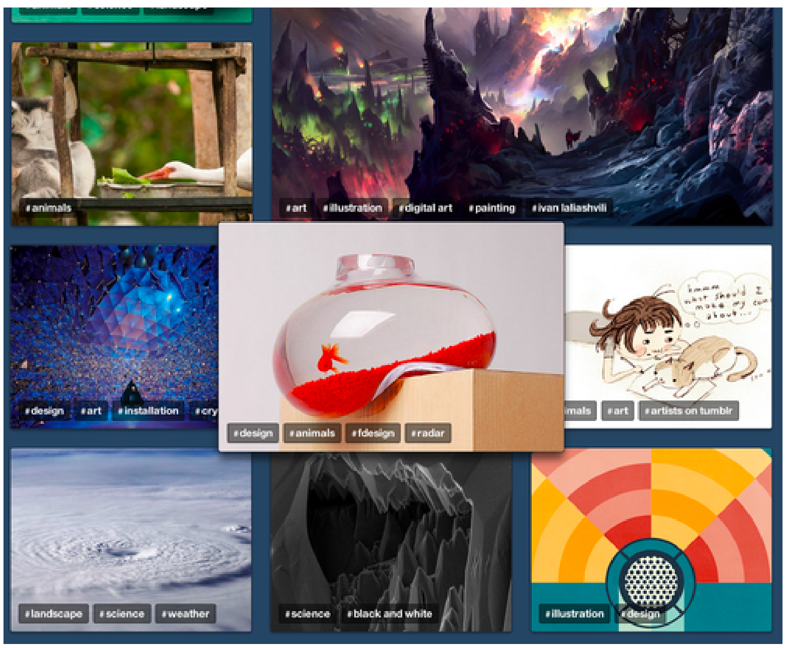
TWEET EMAIL

5 Must Have Marketing & Customer Success Tools Every Startup Should Use

7 DECEMBER 2012

- Discuss on Hacker News -

1. Blogging: Inbound Marketing, Content Marketing, SEO

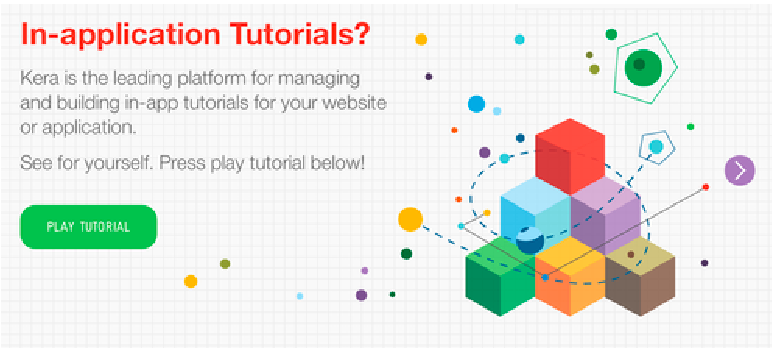


Tumblr is a great and easy way to start your content marketing strategy and improve your SEO. Add a subdomain to your site and set up a custom tumblr. Make sure you have a strong banner or CTA back to your main site.

We use tumblr for our blog. For some inspiration see the best tumblr blogs for designers.

Runner Up: Blogger and Wordpress can be just as quick and also allow custom domains.

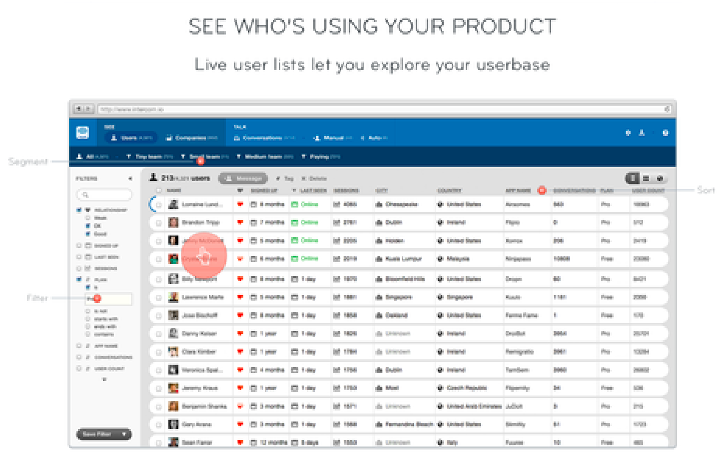
2. Onboarding: How it works, Product Tours, Intro Video



Kera is our product and we believe it's the best way to teach someone how to use your application after they've signed up. Videos are great for generating excitement and getting points across but not that effective in teaching a user how to actually use your application because it's out of context. An interactive tutorial can really help users assimilate to your application.

Runner Up: WalkMe is a good alternative for building a tooltip walkthrough.

3. Communications: Email Marketing, Segmenting users, CRM and Customer Support



Intercom is the best way to segment, communicate with, and understand your users. We use it to welcome new users, track what stage they are in the funnel, when they signed up, last logged in, etc. We also use it to provide support and send newsletters.

Runner Ups: MailChimp and Zendesk are powerful specialists. We find intercom perfect for our needs right now because we don't have heavy email marketing campaigns nor huge support requirements which you might need depending on your startup.

4. Understanding Users: Analytics, A/B testing, Segmenting Users

[Mixpanel](http://blog.kera.io/) is our favourite way to segment users and understand our data. It's great for funnel analysis and powerful for understanding where your users come from and what they do.

Runner Ups: Google Analytics, Geckoboard, and Optimizely.

5. Social Media: Community Management, PR, Measure Social ROI

Hootsuite is a powerful way to manage all your social media channels including Twitter, Facebook, Google Plus, and LinkedIn. They also provide good analytics on your social media efforts.

Notable Mentions

HubSpot is a very hot and highly respected marketing solution we haven't gotten around to trying but it's had great reviews. A bit pricey for startups though.

Stride is cheaper and easier to use than Salesforce for CRM and Lead Management.

So that's what we use at Kera. Thanks for reading and I hope it was helpful.

—Taige Zhang (@taigeair)

TWEET EMAIL

Painting a User Story

5 DECEMBER 2012

- Discuss on Hacker News -

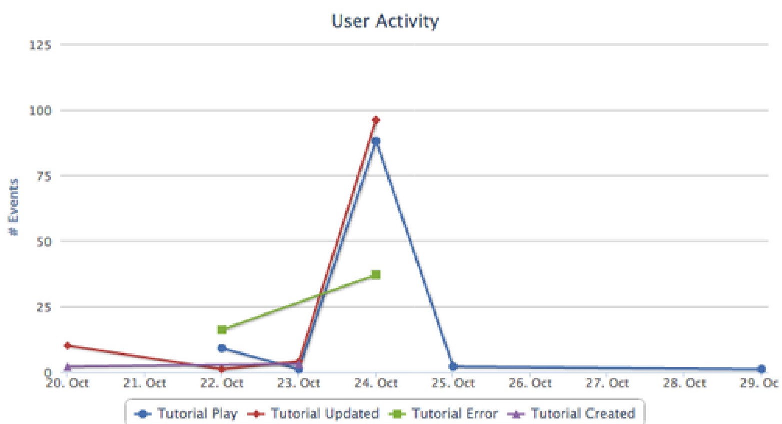
When your software plays host to millions of users, big data aggregates and insights are the only way to manage your understanding of users' usage patterns. But a growing business with hundreds or thousands of users still needs to pay attention to the individual. You need to understand where a user struggles and succeeds.

At Kera, we still rely on individual user feedback to help us make decisions and, of course, help individual users succeed. It's important to us that every customer with the will to succeed makes it happen. But try asking a mathematician to define 'will to succeed' and the only correct answer you'll get is: 'that depends'.

What we do know is that trying to contact a customer weeks after they've given up or forgotten is weeks too late. The sooner we know the better.

We have the usual set of metrics set up: 'last usage', 'error count in the last x days', 'logins in the last x days'. But these only provide a glimpse into a larger data set that makes up the user experience.

To give us a the bigger picture, we crafted the User Story graph.



This particular user story graph tells us how the user initially created a tutorial and updated it a few times. Then a few days later worked extremely hard on making it work. A lot of updates and a lot of errors. Luckily this user would be caught by our normal metrics that track errors, but it also reveals something we wouldn't have seen otherwise: they didn't open the documentation pages even once.

Is the user just not aware of the documentation? Maybe they could benefit from our concierge service to make it for them?

We know this is a customer with fierce determination to make it work so we definitely want their business. But they probably need a helping hand.

Now when we reach out, rather than blindly inquiring about the errors, we can also suggest the documentation page or offer our concierge service. A customer reach-out that's tailored to the individual.

New knowledge, new direction

Then later, maybe we notice the same pattern on more users. And then we have ourselves a new user profile and metric: (# errors received) / (# times documentation opened) ratio.

If we see a great deal of users that fit this profile, it brings up new questions. Is the documentation not apparent or obvious? Should there be more inline hints or suggestions? Should the workflow force a user to open docs?

All of this stemmed from a metric we wouldn't have thought to put in the forefront with the rest of our usage metrics: the number of times the documentation was opened.

The standard set of metrics give you a glimpse into what you already know to look for, but do yourself a favour and allow yourself to see the entire picture. You might see something you weren't expecting to find.

- Dave Wright (@datwright)

TWEET EMAIL

How Extreme is your Startup? - Our Journey Through a Canadian Accelerator

29 NOVEMBER 2012

- Discuss on Hacker News -

For the past three months Kera participated in a Startup Accelerator program called Extreme Startups. We finally finished our three month stretch and I wanted to leave a paper trail for aspiring entrepreneurs who are considering taking the plunge. This post is not meant as a review of Extreme Startups per se as we haven't been in another accelerator. It's hard to know the real differences.

Focus

For the past five years we've been busy building other companies' software. Two of our founders (myself and Max) ran a software services company. Jon, our third cofounder, ran a design services company. We love everyone we had the chance to work for but knew we wanted to transform into a product company someday. When we started experimenting with Kera we finally sat down and questioned whether this was the right time to take the plunge. An accelerator is a great way of forcing your hand.

Meeting Andy and Sunil at Extreme, it became clear that there was no way to keep everything on our plate. I'm proud to say that today we're all exclusively committed to Kera.

Environment

Startups are hectic. Everyday is a roller coaster. The highs and lows are way out of proportion with what is normally considered “normal life.” How hard do you work? How much time do you invest? What about work/life balance? What about our families?

Answering these questions is a lot easier the minute you walk into the Extreme Startups building. Not only do you have the support of Andy and Sunil but everyone else is struggling too. We shared our cohort with single fathers, people separated from their loved ones by thousands of miles, and more. You realize that if they can make the sacrifice, so can you.

Funding

It’s never been cheaper to start a business. But rent still needs to be paid, food needs to be eaten, and computers need to be purchased.

Within days of arriving at Extreme we had a cheque for $50,000 CAD in our bank account. We’ve been careful to manage our money and we’re really conscious of our burn rate so we know that every dollar extra is a huge asset. We also qualified for and received another $30,000 CAD from the Centre for Commercialization of Research which was facilitated by the Extreme Startups partners.

Finally, we’re also eligible for a $150,000 convertible note from the BDC. As a bonus the note has extremely entrepreneur friendly terms. We’re not 100% guaranteed to get it, but we’re hopeful, and the criteria is fair. Not only does this get us off to a great start, but it also means we have runway even if we don’t raise money immediately.

Connections

In business, it’s not so much what you know, but who you know. While we run and attend many startup events in Toronto there are many people that we miss connecting with. These relationships are extremely valuable and don’t go away the day you graduate from the accelerator.

Extreme’s focus on incubating companies is good for this reason: Every day we had a new entrepreneur, venture capitalist, or executive, walking by our desks checking out Kera. These people would then introduce us to their friends or others who could benefit from using our service. We would have missed these networking opportunities if we tried to go it alone.

Final Thoughts

I hope you can tell from my writing that we had a thoroughly positive experience at Extreme Startups. While I’m curious what our experience would have been like at TechStars or Y Combinator, I feel that our progress was accelerated, we are much better connected, and we have a greater sense of what we can accomplish in a short period of time.

I don't expect things to slow down now that we've completed the program. In fact, expect things to get more intense as we focus more on developing our core offering and get serious about building a business around our technology. If you're considering entering an accelerator, now you know what questions to ask. If you're interested in chatting, feel free to hit me up on twitter or email me at cameron@kera.io.

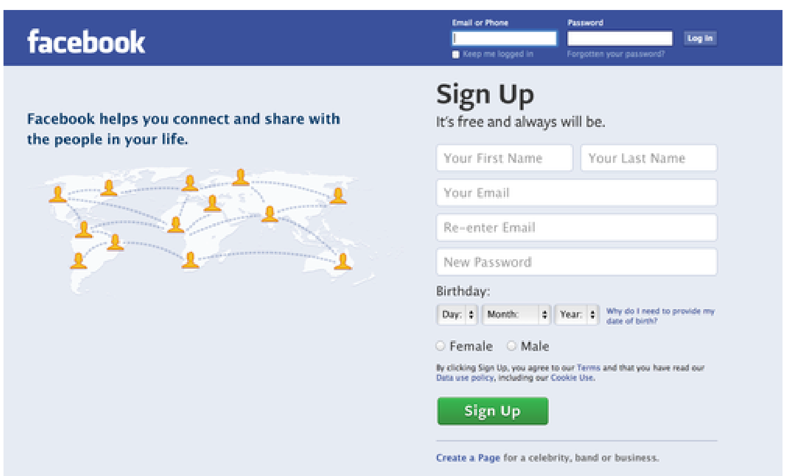
- Cameron

TWEET EMAIL

How Facebook Onboards Its 1 Billion Users

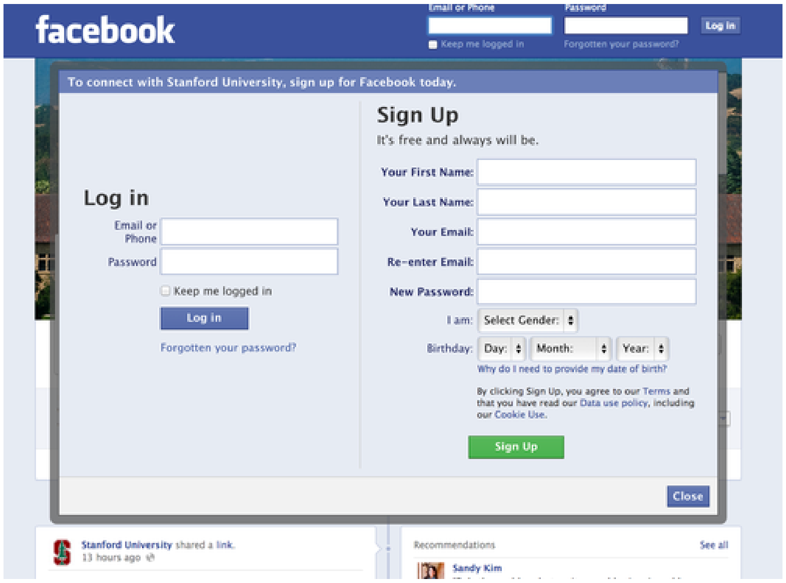
27 NOVEMBER 2012

Facebook reached 1 billion users in October 2012. That's a lot of users. I think many people are interested in how Facebook tours its product and onboards users. Let's see how this world-class company onboards…



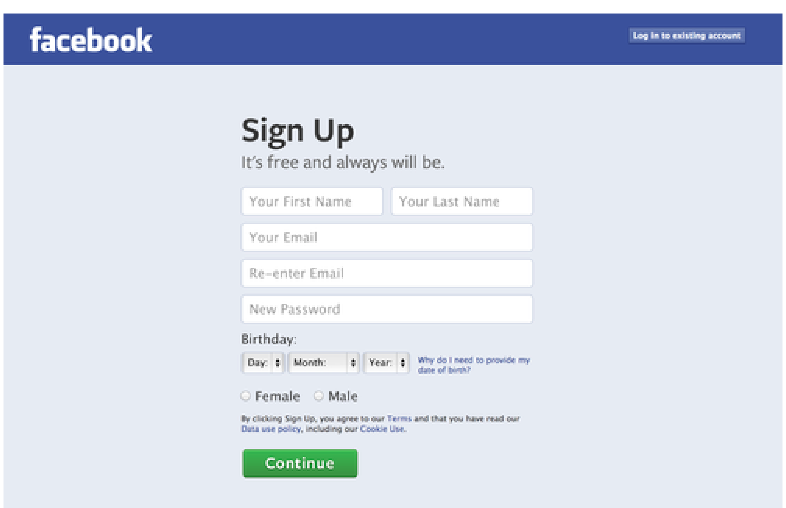
1. Facebook Sign Up Process. These days Facebook pushes you to sign up if you go to facebook.com or profile pages including fan pages. They present you to a modal popup with a sign up form and if you try to take action such as message, you'll be directed to a plain sign up page.

Profile page - Login in or sign up modal popup



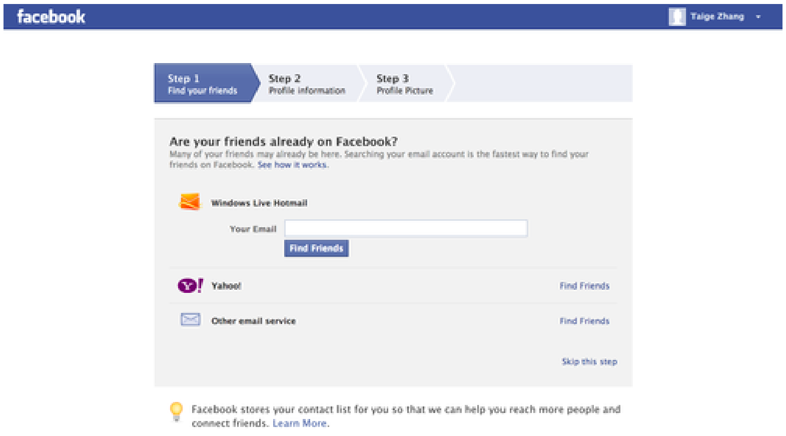
Profile page - after you close modal popup

Profile page- redirect page when you try to interact with person or organization

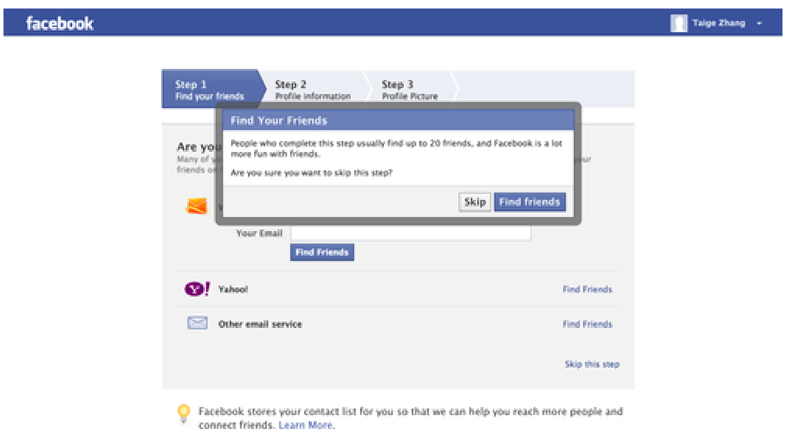


2. Sign Up Funnel. Once you've signed up, Facebook puts you through 3 important funnels that will greatly increase the value of Facebook for the user i.e. convert new users into active users.

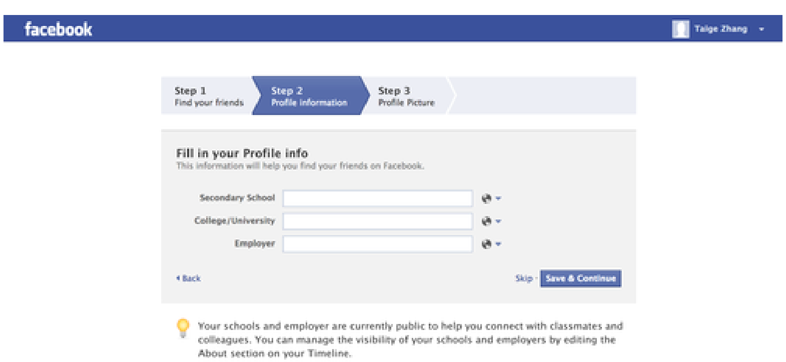
1. Find your friends



And when you try to skip find your friends



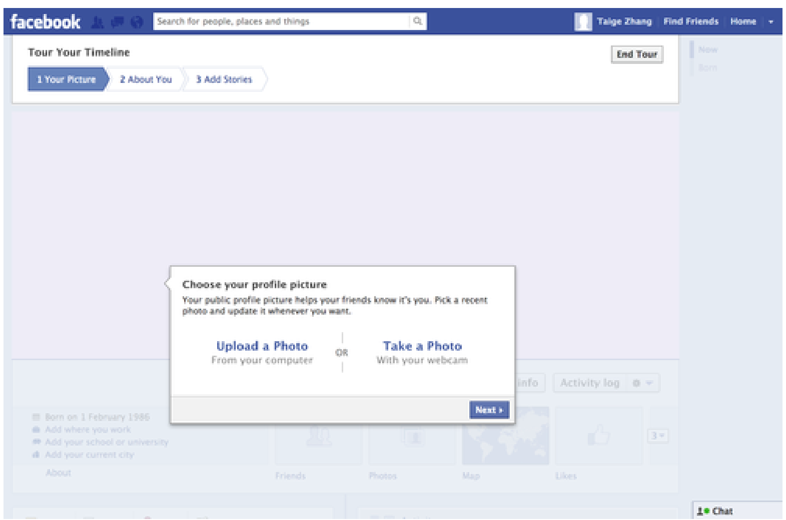
2. Fill in Profile info



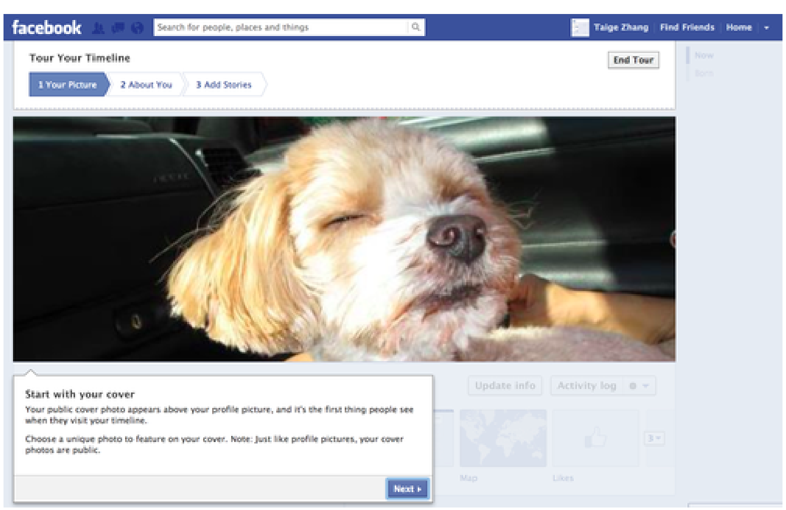
3. Set your Profile picture

3. Facebook's Timeline Product Tour. Once you've completed the onboarding tasks, Facebook give you the option to take a tour. The tour is semi-interactive. For example, you can upload a profile picture directly from the product tour, but not upload a cover photo, add information about yourself, nor post stories.

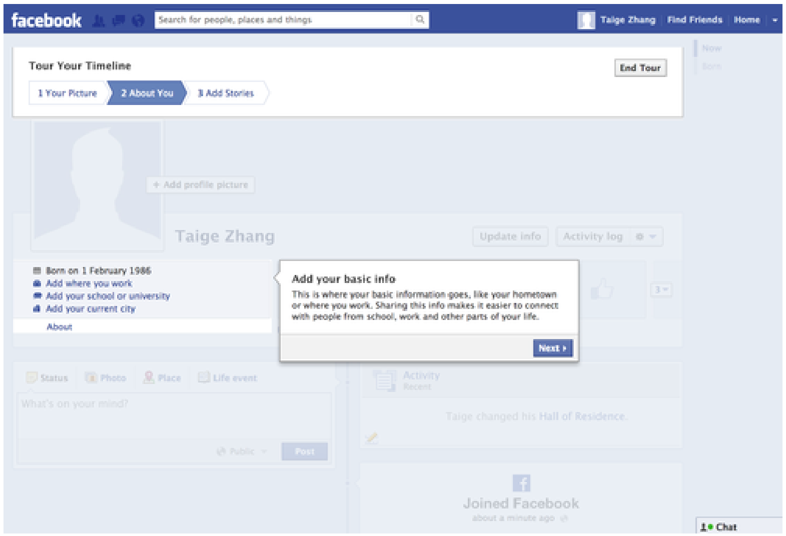
1A. Profile picture - if you haven't uploaded a profile picture, you can do it from the tour.



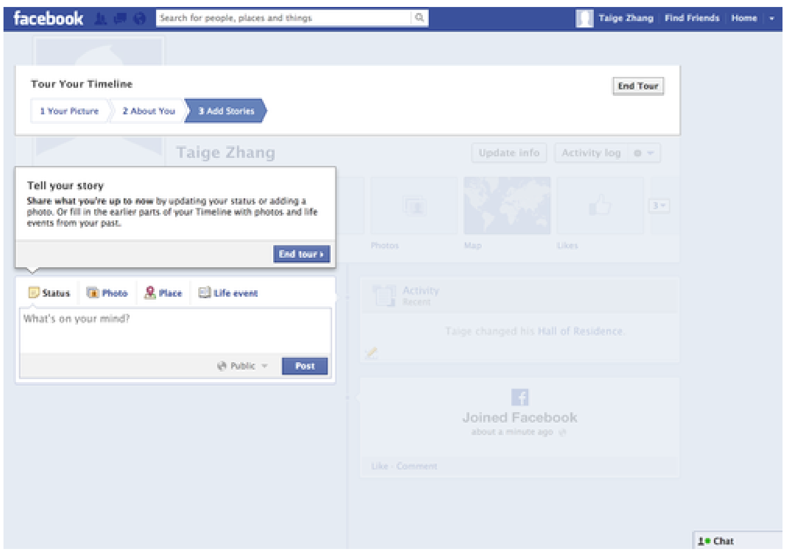
1B. Cover Photo - introduces user to cover photo.



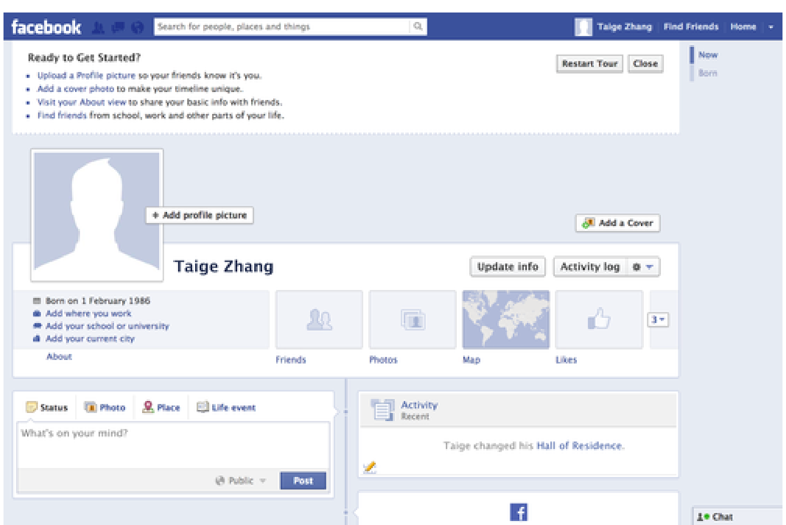
2. Add your basic info - points out where you can find your basic info.



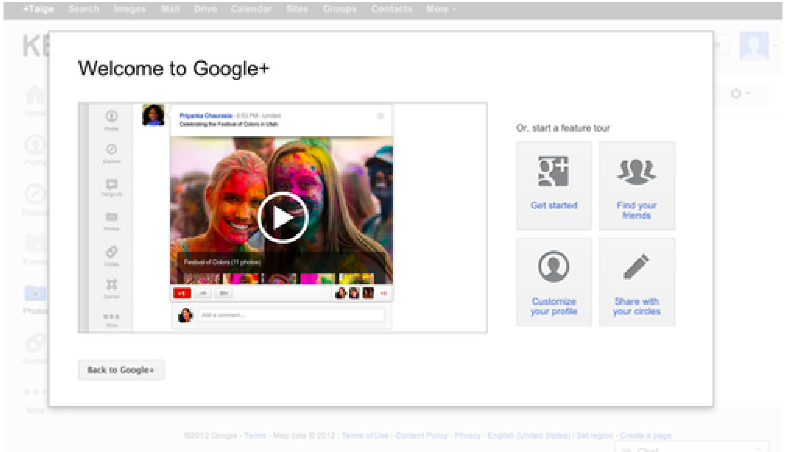
3. Tell your story - highlights where you can post stories.



Lastly, Facebook also provides a way for users to re-take the tour.

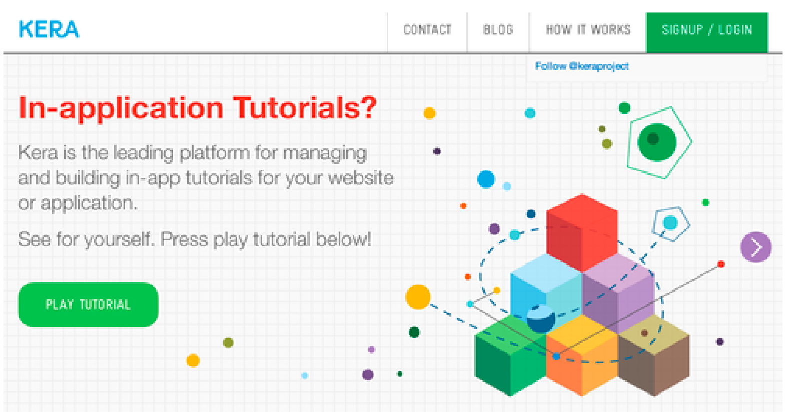


Conclusion. Facebook and Google+ both also have excellent videos and feature pages that gets users excited and invested in the idea. See feature pages of Google + and Facebook Timeline.



These great companies have also taken another step to increase conversions by building custom interactive tours that teach users how to use the applications inside the application itself. The best way to teach someone how something works is in context (i.e. in-application.) Both these companies are addressing the issue of onboarding users properly. Showing users where things are within the app is a lot more effective than showing it on a video; however, where they fall short is actually letting users complete the tasks during the tour. For example, you can't actually edit your profile or share stories during the tour. Facebook seems to want users to complete tasks during the tour given it has added the functionality to add a profile picture within a tooltip; yet it may be difficult or unprofitable to build a custom jQuery tour solution that allows other tasks such as sharing a story.

I wonder if they have heard of Kera, a simple way to create and deploy interactive tours for your web application.



—Taige Zhang (@taigeair)

TAGS: FACEBOOK , GOOGLE PLUS , ONBOARDING EXAMPLE

TWEET EMAIL

How to Create a Great Interactive Walkthrough or Tutorial for Your Web Application

21 NOVEMBER 2012

Many games such as Portal, World of Warcraft, and Kingdoms of Camelot have good tutorials that familiarize you with the game and teach you the basics. But those are designed by experts who have gone to school for that. How do you, a developer or marketer, create something that great for your web application?

Here at Kera, I've built 10+ tutorials and learned some tips and tricks that I want to share. The Kera tutorial building platform is pretty easy to use. It has two components: creating events which requires some CSS and HTML knowledge so you can target DOM elements and sound which is optional but extremely useful.

Planning

Decide and plan out your walkthrough or tutorial. Consider these questions:

- What do you want to accomplish with an interactive tutorial?
- Should it give an overview of your application, highlight features, or help and teach users to complete tasks?
- Are there tasks users can accomplish in the tutorial that will increase conversions?
- How long should the experience be?
- Do you want to include audio?

Once you've decided, it's good to create a storyboard or outline of the events of the tutorial. No matter what type of tutorial you plan to make, we recommend keeping tutorials to less than three minutes because longer tutorials have less engagement. It's better to create several shorter tutorials rather than one big one. This will make it easier for you to manage and for the learner to understand. See some examples from our showcase.

Creating Events

Be clear. Move the virtual cursor to the thing or area you're talking about as you would in a screencast. This will make it clear to the user exactly what you're referring to. Use the "move" event type.

Keep their attention. Ask the user to click on buttons such as navigating through your application to keep them engaged and interested. Getting them to do something allows them to remember it better than just showing them. Use the “click required” event type to ask users to click on something and “input required” to get the user to type something.

Doing the real thing. Keep in mind a new user might not have any data that you can use to teach them. Consider creating dummy data for new users or building a tutorial that creates something that can be deleted once the tutorial is over.

Give the users more freedom. Kera has a safety layer that prevents users from going off track and doing things not specified in the walkthrough. When they try to click outside of the targeted element they will be prompted to quit or continue the tutorial. You can enlarge the allowed area of free play for the user by using the attribute “reveal”. Specifying an “reveal” area will override the default reveal on your event; so make sure you encompass the the element you want the user to interact with within your revealed area. Protip: reveal the complete form for the user when asking the user to click on submit so they can make any revisions.

Voiceovers and Sounds

Recording tools. You can record audio using your smartphone’s voice recorder app or a computer program. If you don’t have one try eXtra Voice Recorder Lite or QuickTime (screen recording and then export audio) for Mac and Sound Recorder for PC. Don’t worry about file size. Record high quality audio and Kera will optimize it for the web when you upload it.

Use Voiceovers. A human voice better engages users and makes them feel that they are dealing with a real product made by a real company. Make sure your voiceover is read clearly, slowly and with a smile so that it sounds friendly. If you don’t feel confident about using your own voice, there are affordable services such as VoiceBunny that can help.

Have an introduction. It’s nice to know who you are and what the tutorial is about in the beginning. This a great way to welcome and convey important information to the user.

Use a script. Reading from script is really helpful because reduces speaking mistakes and makes it sound more professional.

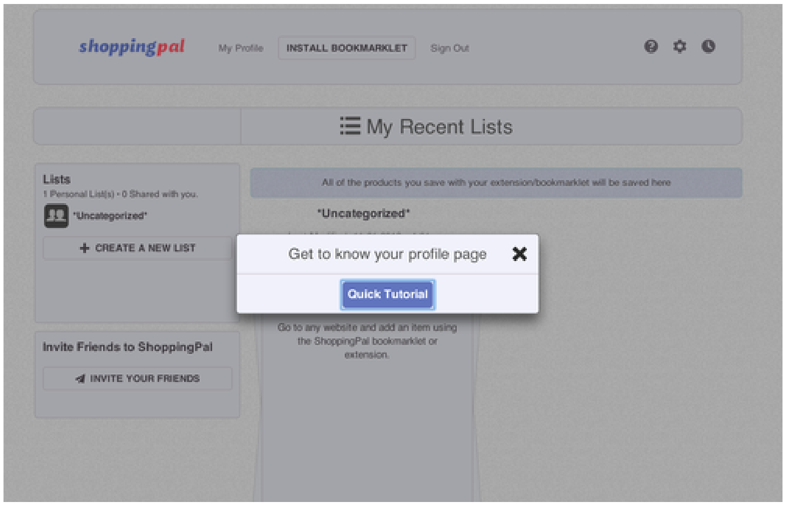
Include pauses. It is important to leave pauses in your recording when asking the user to complete tasks. We recommend leaving 1.5 second pauses because different browsers resume playback differently and may skip ahead a bit. If you have dynamic events such as modal popups or AJAX events, please note it might take more time for the user’s web application to render due to varying internet speeds.

Be in a quiet surrounding. It is vital to record your voice in a quiet place and free from distractions. It will appear more polished and professional.

Background music. Consider adding music to help increase engagement, professionalism, and to better convey your brand. Check out Unique Tracks and Royalty Free Music.

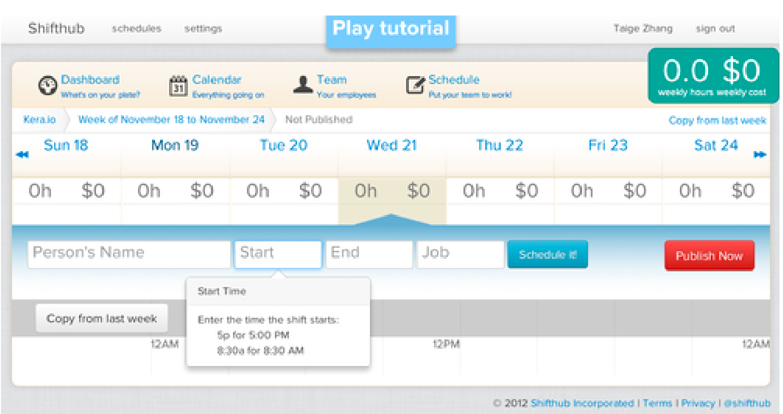
Call To Actions (CTA)

Welcome walkthrough. Kera tutorials can be used to welcome and onboard a new user after signup. Consider using an auto-play walkthrough right after signup to introduce your users to your application's interface and highlight important features. Another popular method is to use a lightbox to present the CTA and allow the user to launch the tutorial. This has the advantage that the user is expecting a tutorial.



Example of a lightbox launched tutorial

Show specific tutorials on specific pages. You can attach a tutorial to anything: links, buttons, icons, flags, lightboxes, etc. You can have different tutorials on different pages by binding specific tutorials to specific CTAs on particular pages.



Example of a tutorial presented only on the schedule page

Show tutorial to specific users. You can launch specific tutorial for specific users. For example, you can set a flag on your backend for users who haven't completed the tutorial and render a CTA such as a popup or notification from where users can launch the tutorial. Once the user completes the tutorial, you can set their flag to completed tutorial and not generate the CTA for the user.

Lastly, check out some videos of tutorials on Kera's Customer Showcase!

— Taige (@taigeair)

TAGS: LEVERAGING GREAT GAME DESIGN IN WEB APPS BLOG SERIES

TWEET EMAIL

Dave Wright is a Keranite!

20 NOVEMBER 2012

Databases. Statistics. Optimization. Baseball.

These are the things Dave is passionate about. He's going to be helping us build out the analytics and measurement side of Kera. I've worked with Dave in the past and am sincerely excited to have him as our first engineer! You can check out his collection of hilarious videos or follow him on twitter.

- Cameron Westland (@camwest)

TWEET EMAIL

Attention Spans and Response Times: How Fast is Fast Enough?

15 NOVEMBER 2012

— Discuss on Hacker News —

Your brilliant web application and marketing efforts have won you visitors and recognition. But there's a ticking time bomb built into every interaction on your site. In about 1 second your potential customer is going to start thinking about doing something else.

The Experts Say…

Usability expert Jakob Nielsen calls it a fight against "the inevitable decay of information stored in short-term memory" [1]. How quickly your web application responds will have an impact on your engagement and the attitude towards your site.

In 2006, Google famously experimented with displaying 30 results per page instead of 10. But the extra results forced loading times up to 0.9 seconds from 0.4 seconds. The result was a 20% drop in ad revenue [2].

Google being Google probably didn't lose too many customers in the long run. But for a relatively unknown startup, it could be a large price to pay.

A 2006 study from Akamai states that "fifty-five percent of online shoppers who spend more than $1,500 online per year insist on pages loading quickly" [3].

How fast is fast enough?

It turns out web pages are no different from any other interaction. Our levels of patience over time follow a pattern that's easy to remember [1]:

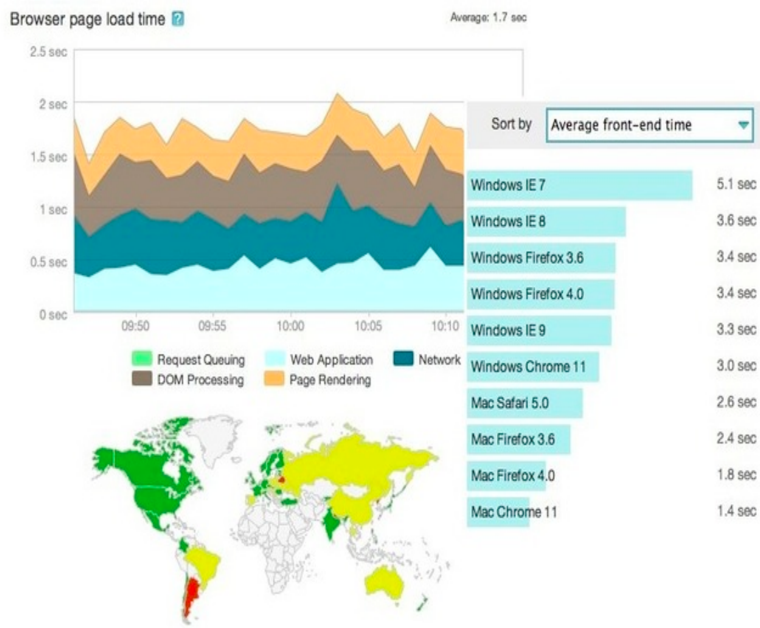
> 0.1 seconds gives the feeling of instantaneous response — that is, the outcome feels like it was caused by the user, not the computer. This level of responsiveness is essential to support the feeling of direct manipulation
> 1 second keeps the user's flow of thought seamless. Users can sense a delay, and thus know the computer is generating the outcome, but they still feel in control of the overall experience and that they're moving freely rather than waiting on the computer. This degree of responsiveness is needed for good navigation.
> 10 seconds keeps the user's attention. From 1–10 seconds, users definitely feel at the mercy of the computer and wish it was faster, but they can handle it. After 10 seconds, they start thinking about other things, making it harder to get their brains back on track once the computer finally does respond.

Three Factors

Now that we know keeping response times under a second is crucial to a happy user experience, let's look at the factors that make up a response on the web:

(Server response + Browser render) + Latency

The parts you have control over are server response and browser render time. Tools like NewRelic help you keep tabs on those times and should notify you when they become intolerable.



Latency, however, is mostly out of your control. It's the time it takes for information to travel between a device and your server. Since the rise of broadband internet connections, latency time has generally stabilized to well under 0.1 seconds.

Mobile Latency

But the new surge in mobile devices has reintroduced latency as a problem. Average latency on mobile devices ranges from 0.1 - 1 second. Latency on Sprint's 4G network averages 0.15 seconds. On their 3G network requests average 0.4 seconds [4]. So now just to satisfy your mobile customers, you need your server response time under 0.6 - 0.85 seconds just to keep the average mobile user engaged.

It's up to you your and your engineering team to stay aware of those response time numbers and keep them down to a tolerable level.

So while your marketing efforts will land users on your site, make sure you devote some effort on response times to prevent them from wandering off and keep them coming back for more.

- David Wright

[1] http://www.useit.com/papers/responsetime.html
[2] http://glinden.blogspot.ca/2006/11/marissa-mayer-at-web-20.html
[3] http://www.akamai.com/4seconds
[4] http://www.igvita.com/2012/07/19/latency-the-new-web-performance-bottleneck/

TWEET EMAIL

Four Criteria for Choosing The One Metric That Matters

13 NOVEMBER 2012

— Discuss on Hacker News —

Engagement metrics are tricky. There are complicated algorithms which aggregate metrics into "Engagement Scores". There are funnel analysis techniques which show where people are dropping off. Then there are tools that let you add engagement metrics to each and every button on your website. It's a mess.

Start Simple

At Kera we're starting simple with our engagement metrics. We know that measuring too much early on can make it difficult to focus on what's important. We're not interested in running around like chickens with our heads cut off.

The One

Ben & Alistair are doing a great job helping product teams discover how to use measurement quickly and effectively. They wrote a post about the one metric that matters. Is it possible to isolate a single metric which radiates enough information? We sat down to establish criteria on what kind of measurement that would look like.

Value

One of the more challenging parts of Kera putting our product out there early is showing the value quickly to prospects. We learned that once users see value they are much more likely to pay. Measure the delivery of value to your customers.

Knowledge

The metric needs to tell us something about how much a user knows about our application. For example: We should know that a user knows how to accomplish task A, B, and C in our product if they have generated that metric.

Revenue

If this metric grows, you make more money. This is related to the ‘Value’ criteria above.

Frequency

Being a Lean Startup we know we need to make decisions as fast as possible. We can’t wait until the end of the week or month before we see the metric moving. The ideal metric happens every day.

Our Metric

So what did we come up with? The metric for us to focus on is ‘Number of customers with one walkthrough play’. This meets our 4 criteria.

Value: If a learner is playing one of our customer’s walkthroughs they are learning about their product or accomplishing a tough workflow. Our customers obviously see value in that.

Knowledge: We know that if learners are playing a walkthrough our customer was able to author and publish it successfully.

Revenue: We are a SaaS business, the more customers that play a walkthrough daily, the more money we make.

Frequency: Kera is designed to help every user. An ideal customer is one that installs Kera into their application so all their users can benefit. We can instantly see if a customer is in trouble by noticing that they haven’t had at least one walkthrough played in their application in a day. We can also measure this monthly and create a DAU/MAU ratio to see how our engagement is growing over time.

Feel free to reach out if you need some help figuring out which metric you should be focus on. We’d love to help.

-Cameron (@camwest)

TWEET EMAIL

8 NOVEMBER 2012

We've created new documentation on "Installing Kera" and "Creating Your Tutorial" to make it easier to get started. Sign into Kera and click on the Documentation tab to check them out. Or simply watch this video!

Let me know if you have any feedback. Looking forward to seeing your walkthroughs!

—Taige (@taigeair)

TWEET EMAIL

What I Learned in San Francisco

6 NOVEMBER 2012

Discuss on Hacker News

If you're a startup founder and you've never been to San Francisco, stop what you're doing right now. Now go buy a plane ticket, and pack your bag. By the time you finish reading this, you'll be glad you did.

People had been telling me for ages to go and visit the bay area. I heard people there work with a sense of unmatched urgency, that you can feel the energy in the air, and the density of startups is mind boggling.

At a certain point in time a few weeks ago, I made up my mind and bought my plane ticket. It was time to visit Mecca. But we knew it wouldn't do any good to fly out there, sit at a coffee shop and wait to meet interesting people. Luck favours the prepared.

We knew we needed to reach outside of our limited network to meet new and different people. So we did the natural thing — we posted to HN, and asked the community, "Can we visit your startup in San Francisco?" Low and behold, we got our first taste of the SF startup community, and got invited to over 30 startups.

We visited so many startups that it's impossible to mention them all here in detail. But there are five groups of people who went above and beyond and to whom we are truly grateful:

1. Segment.io — These guys are awesome. They signed up for Kera a while back and we've been chatting ever since. When I told them we were coming, they asked where we were planning to stay. Ian convinced me not to stay at a hotel, and instead crash in their hacker house. I was floored by their generosity, and I seriously hope I can host them up in Toronto some day. They're not just customers anymore, they're my buds.

2. Launchrock — I can't wait for when Launchrock releases what they've been working on, but I don't want to spoil the surprise. All I can is that Jameson's crew has some of the best energy I've seen anywhere, and they all have a sense of curiosity I could feel immediately. Jameson also wins for finding us the best coffee in SF.

3. Chute — All I can say about Gregarious is that he's a magnetic leader. He has the chutzpah that every founder wants to have. It's rare that you meet a guy that can be a customer, a mentor and a coach.

4. PagerDuty — Alex is a Canadian founder who is now based in SF, and he was kind enough to have us over, and talk with us about how he's built his startup, PagerDuty. After we spent some time getting to know each other, he made some incredible intros on our behalf and I definitely owe him a few when the time comes.

5. Optimizely — I got a random email from my old high school buddy Matt. Turns out Matt (who I hadn't spoken to in ten years) just had a baby and is also Head of Sales for Optimizely. We spent a full hour with him and Pete talking about proxying websites, pricing models, and value propositions. Optimizely is killing it and they're inspiring us to do the same.

To the teams at Twitter, Crowdflower, Dr. Chrono, AeroFS, Medigram, Betable, Gigwalk, Xobni, Zillow and others who invited us over, I want to personally say thank you.

What I heard about San Francisco turned out to be true. People are working hard over there, there is a ton of energy, and there are so many startups in such a dense area that it almost feels like a city within a city. It's rare that you feel at home in a brand new place, but that's exactly how it felt.

But what truly impressed me most about San Francisco were the people we met. They were generous, helpful, and most importantly - curious.

Almost every one of them asked how they could help out, who we wanted to meet, and how we could work together.

Thank you San Francisco, we'll certainly be seeing you soon. In fact, we'll be back for Lean Startup Conference.

— Max Cameron

TWEET EMAIL

To Auto Launch or Not?

1 NOVEMBER 2012

Discuss on Hacker News

Idea

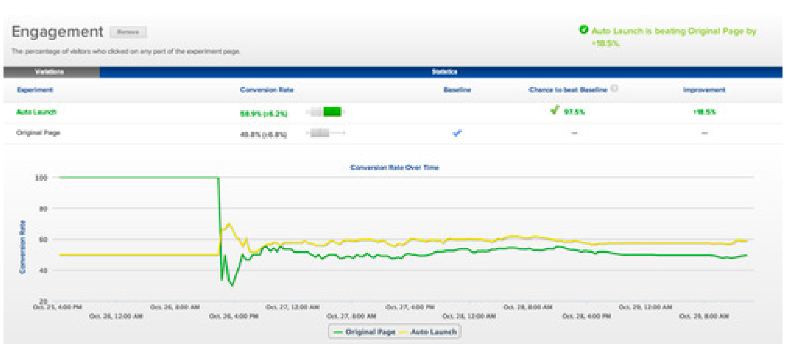
We want people to learn about our platform for building and managing in-application tutorials. We've been trying to increase our conversion rates of people playing a tutorial.

Why not just play it then? We considered auto-playing the tutorial but it would be too annoying and intrusive so we opted against it. Auto-launching however might be a great way to get them to notice we have a tutorial they can play.

Quick Test

We ran two home page variants. One that auto-launched our tutorial in a paused state and one that didn't. An auto-launch is when the Kera play bar loads and you see a play button.

Results



The graphs above show auto-launching a tutorial helped with engagement but didn't increase signups.

Thoughts

Increasing the discoverability of tutorial by loading the Kera play bar didn't translate to more signups. Some possible reasons may be 1.) people like to be in control of launching a tutorial 2.) they found it intrusive and we lost goodwill - kind of like animated talking avatars or Microsoft Office's Clippy, or 3.) people thought it was a video or sound player.

We didn't track if auto-launching the player increased the percentage of people playing tutorials but we should next time.

It's possible a video or entertaining animation is best for introducing new visitors to your application. Once a user has decided to invest in your product or application, the tutorial may be the appropriate and powerful way to educate users, shape user behaviour, and prevent churn in the application. For example, we got 3X more users to build a tutorial by auto-playing our "Welcome to Kera Tutorial" post sign up.

We're building case studies on Kera tutorials' effects on metrics before sign up, during signup, after signup (onboarding), and in regards to customer support. If you have built a Kera tutorial and would like to work on a case study with us, please email me at taige@kera.io We'll give you a good discount!

— Taige Zhang

TWEET EMAIL

Building Your Own Cohort Report with Highcharts

30 OCTOBER 2012

My favourite type of cohort report is the state based percentage area report shown in my last post. Before creating this using Highcharts I'll first explain the basic parts a chart.

Title

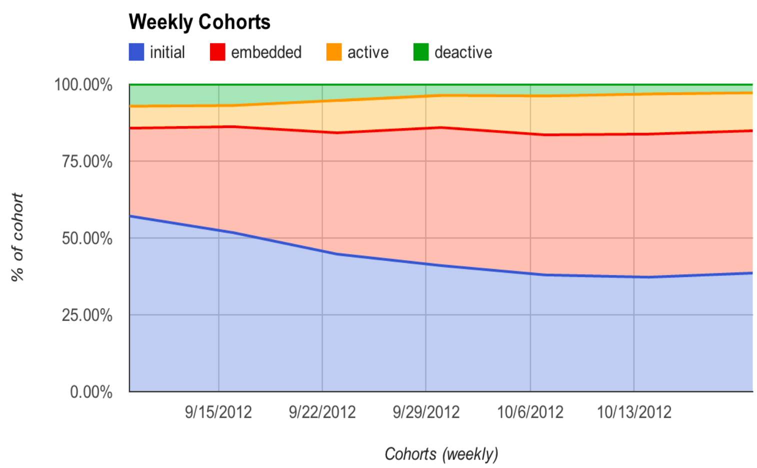
Being able to differentiate between charts easily is valuable. Don't forget to use good titles. This should go without saying.

Legend

Useful for differentiating between series of a chart easily. Most charting systems are colour based, but there are some that use patterns to differentiate as well.

x Axis

This axis runs horizontally on a chart, sometimes called the category axis. Each item on the axis is known as a category. In the chart below the categories are dates for a week of signups.



y Axis

The axis that runs vertically on the chart. The y Axis is the value that a series will have for a category. For example, the initial series has a value of 51% for the 9/15/2012 category.

Series

A series is a group of similar numeric values across a group categories. Usually a series will have a name which is coded in the legend. Continuing on with the above example, the Initial series looks like this: [57.14%, 51.72%, 44.74%, 41.02%, 37.97%, 37.24%, 38.58%].

Highcharts

Jump ahead and check out the results here: http://jsfiddle.net/n9pCh/2/.

The best part about Highcharts is that it's easily embedded into Geckboard. We'll cover that later, for now let's take a look at the different parts of the code. We'll skip over any part that's not interesting or self-explanatory.

Area Chart

```
chart: {
    renderTo: 'container',
    type: 'area'
},
```

Render the chart inside the html element on the page with the id of 'container'. It also sets the type of chart to area.

```
xAxis: {
    type: 'datetime',
},
```

Tells the chart that the categories on the x Axis are dates.

Tooltips

```
tooltip: {
    formatter: function() {
        return this.series.name +': ' +
Highcharts.numberFormat(this.y, 2) +' (' +
Highcharts.numberFormat(this.percentage, 1) + '%)
for week ending '+ Highcharts.dateFormat('%b %d',
this.x);
    }
},
```

This one's messy. It makes the tooltips have specific information in them. They end up looking like this: embedded: 10.00 (34.5%) for week ending Sep 16.

Plotting Options

```
plotOptions: {
    area: {
        stacking: 'percent',
        pointStart: Date.parse('2012-Sep-09'),
        pointInterval: 7 * 3600000 * 24, // 7 day
interval
    }
},
```

This stacks the series on top of each other and converts their values into percentages. It sets the point start date, and how much time is between each point.

The pointInterval is a little confusing. It's the number of milliseconds between each point. So the full calculation above is really 7 (days) * 24 (hours) * 60 (minutes) * 60 (seconds) * 1000 (milliseconds).

Series

```
series: [
    {
        name: 'initial',
        data: [8, 15, 17, 137, 150, 200, 250]
    }
]
```

The final and most important part. I've only included one series here, but you can add as many as you want (check the jsFiddle for a full example). It's made up of the name of the series and the values for each category.

Now you know how to create a cohort report using Highcharts you can start to impress your investors. The next step will be to get it generating real data using SQL queries from your database.

-Cameron

TWEET EMAIL

How Changing a Button Name Can Increase Conversions by 56%

26 OCTOBER 2012

- Discuss on Hacker News -

Intro

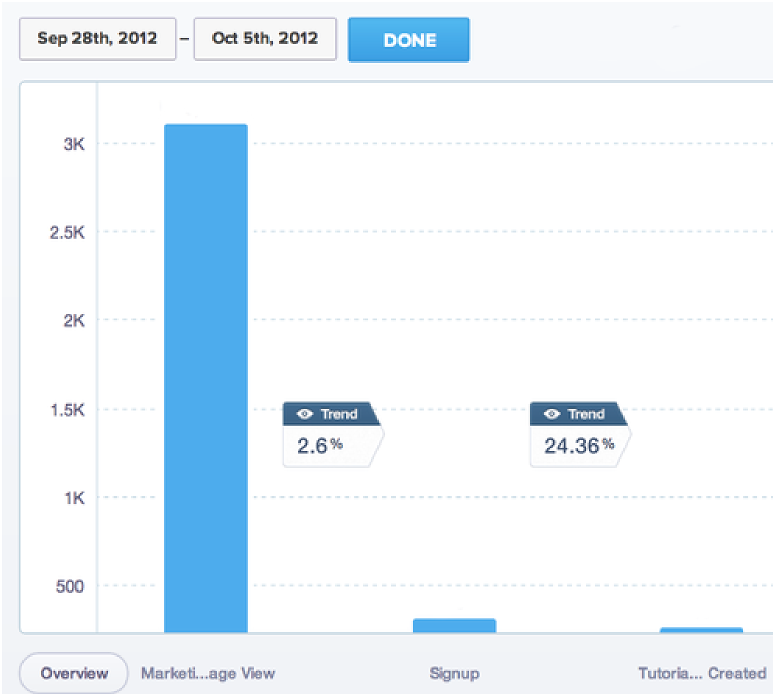
If you don't do A/B testing because you think it's hard, you should try Optimizely. It's amazingly easy to set up and you don't need to bug your developers to deploy any changes. It can do wonders for your conversions!

Take our case. We need users to play our tutorial to understand how cool and powerful our interactive live tutorials are. Once a user has played our tutorial there's a 45% chance they will sign up. So step 1 - we need to get them to play our tutorial.

How do we do that?

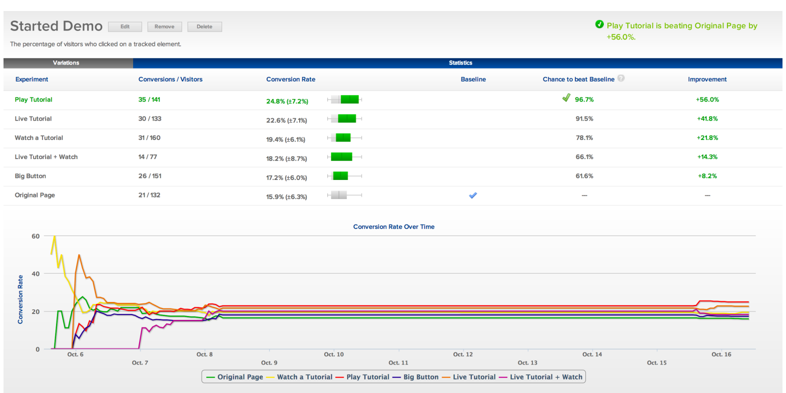
1. Original. Sept 28th - Oct 5th. Results.

We had about 2.6% of people who came to our site sign up. That's not great. Let's increase this by getting more people to play our tutorial.



2. Testing. Oct 6-16th. Results while running.

We started doing A/B tests in this period by running some variants. The original button said "See An Example". We tried "Play Tutorial" and "Watch a Tutorial." We tried a bigger button and a different heading "Live Tutorial" also.

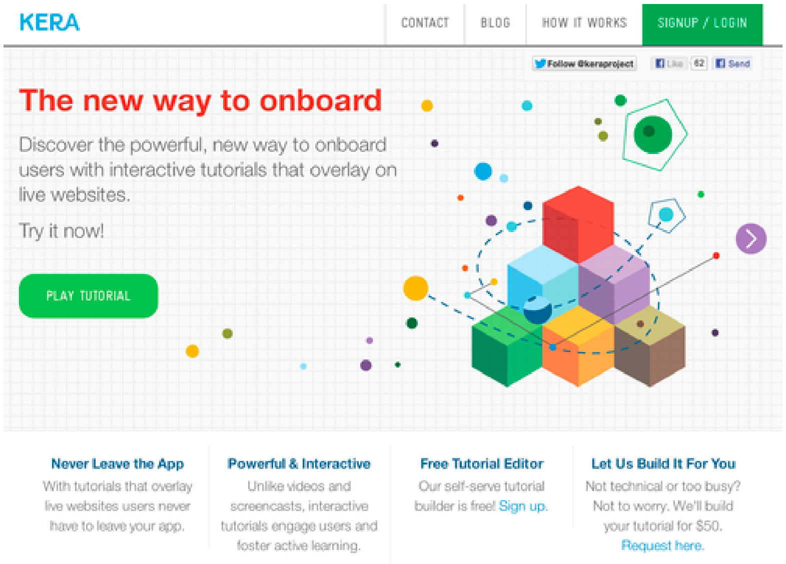


The results show that "Play Tutorial" button gets 24.8% of visitors to click and the original button only 15.9%. That's a 56% improvement!

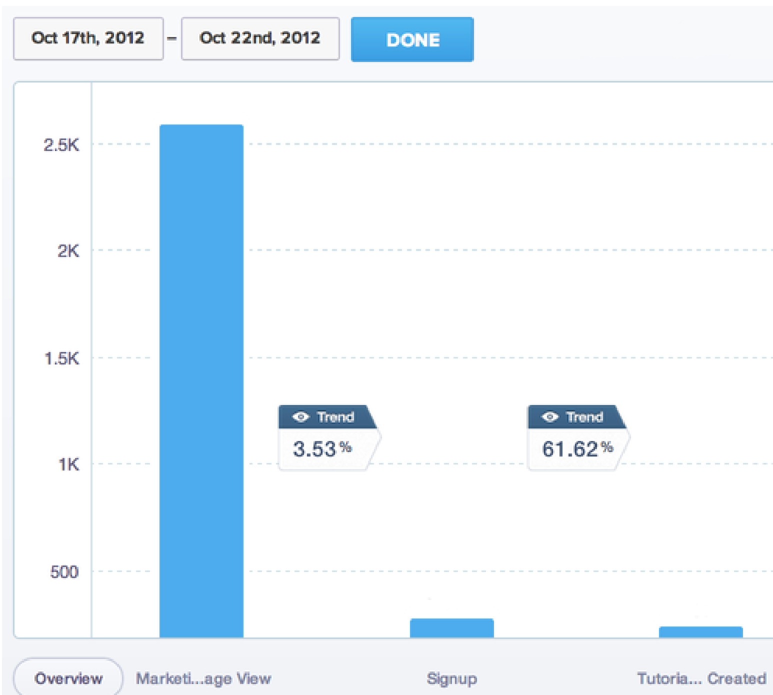
*The long straight lines in the middle appear because experiments were completely turned off for those days.

3. Solidify learnings. Oct 17th - Oct 22th. Results.

On Oct 17th, we rolled out the variant "Play Tutorial" button to all visitors. This is our new home page.



You can see the % sign up increased from 2.6% to 3.5% which is almost a nice full percent.



Conclusion

We will continue testing to increase our conversions. This is just an example of how A/B testing can improve your conversions.

By the way, you may have noticed our 3rd metric, Tutorials Created, jumped up during the course of the experiments. That my friend is the power of a Kera tutorial. We rolled out a Kera tutorial to welcome all new users right after sign up and walk them through building a tutorial. Yep, that's almost a 3X increase in a desired user behaviour.

What interesting results have you found with your A/B tests? What have you found since you implemented a Kera tutorial? Email me at taige@kera.io or comment.

— Taige Zhang

TWEET EMAIL

Learning from Apple: Determining the Right Metrics for Your Business

23 OCTOBER 2012

— Discuss on Hacker News —

Moving the Needle?

At Kera we're interested in determining whether our tutorials are helping users learn an application. Are we improving the learning experience and delivering better results? We need metrics that give real indications on how well we are helping SaaS companies educate and train their users.

Apple

What I learned from Apple about KPIs:

> Relevant. Quantifiable. Actionable.

At Apple, I worked directly with the Sales Director of EMEIA and we used only 5 KPIs to measure our overall success on a bi-weekly basis. Too much information is almost as bad as no information. It's about picking the few, right metrics that impact the business.

For example, one KPI we used was Sell-Thru — despite most companies in the industry using Sell-In. Sell-Thru data is a lot harder to come by because we need to know exactly how many units are sold by each of our channel partners (Apple's customers, not end users). This is extremely hard to get even with Apple's influence and actually involved many interns calling up and chasing partners for that data. However, this is crucial to Apple's success because it doesn't matter how many we sell to them, only how many they sell to their customers. If we can predict their inventory levels, we can forecast sales and keep our inventory levels to a minimum and match demand.

So what metrics should we use for learning?

Metrics for Learning

1. Active Users / Retention Rate

Users that understand how an application works and are able to derive value from it are more inclined to come back. You should see active users increase with better onboarding and user education. One of our clients had a 10X increase in active users after implementing a Kera tutorial.

2. Engagement with a Feature

Users that aren't aware of a feature or tool won't engage with it. With proper onboarding, you'll be able to draw attention to the feature and you should see a rise in use of the feature.

3. Support Tickets

The more confused your users are, the more support tickets you'll get. If you group support tickets into categories, you can analyze them and figure out which parts of your website are challenging for users. Build proper onboarding experiences and you should see a decrease in those support ticket categories.

Usability

While this isn't really a true KPI (rather a qualitative analysis), usability studies can be a way to gauge how complex your SaaS product is. If it's complicated, you may want to offer resources such as a FAQ, manuals, documentations, how-to-videos/screencasts, webinars, tooltips, or tutorials.

My company Kera is a tutorial building and management platform for businesses. The main benefit of Kera tutorials is that it's in app so users never have to leave your application to learn to do something. Give it a try here.

-Taige Zhang

TWEET EMAIL

Why Omitting Social Media Buttons is a Bad Idea

17 OCTOBER 2012

Discuss on Hacker News

There's an article from a prominent design blog describing social media buttons as sleazy, pointless, and even harmful. I completely disagree. As a marketer I always want to make it easy for a user whether it's 1) performing a certain task or 2) making a decision.

After some criticism, the author tempered his stance in a followup but still concluded:

Still Sleazy

> A lot of (technically savvy?) people despise these buttons and do indeed consider them to be sleazy. If early adopters in tech are indicators of tech trends, then these buttons will disappear sooner or later.

I am tech savvy and lots of tech savvy sites have them. Maybe only the most elitist tech savvy people despise them? Well even Harvard.edu has them. Share buttons are basically vending machines that provide convenience.

Works for Some Sites

> Apparently, they work quite well for activist political sites and removing them might not be the smartest thing for similar sites.

It's also not smart for non-political sites to omit sharing buttons. Since KISSmetrics, Mixpanel, and Conversion-Rate-Experts (sites that are optimized for metrics) are using share buttons, it can't be that bad.

They Profit from You

> Don't be fooled: If you have 30 visitors per month, those buttons won't make you a star. And for a quality brand with a higher brand value than Facebook and Twitter (yes, they still exist), these buttons actually profit more from you than the other way around.

I'm pretty sure we all profit. Facebook maps the web and sells ads. You get traffic and a relationship with your fans. Fans get to express their thoughts and identity, and create connections with people and companies.

Used by Top Brands

Even though Coke has greater brand equity than Facebook, Coke still has a Facebook Social Plugin on its worldwide homepage! This shows how much value Coke believes Facebook provides.

Conclusion

The only reason to omit social media buttons is if you're such a big and powerful company it doesn't apply to you. You can make a statement by saying you're above all that petty social sharing. Maybe for companies like Oracle, Apple or SAP, they don't need it but as a startup this is essential. But even then didn't Apple try to make a product called Ping and then integrate Facebook and Twitter into their iOS?

Lastly, it's not just allowing people to share their enthusiasm and gaining traffic. It's also social proof and barrier to entry. Likes and followers are something you build like SEO and it takes time. It's an asset for any company.

— Taige

TWEET EMAIL

Cohort Analysis: Metrics for a Scalable Business

16 OCTOBER 2012

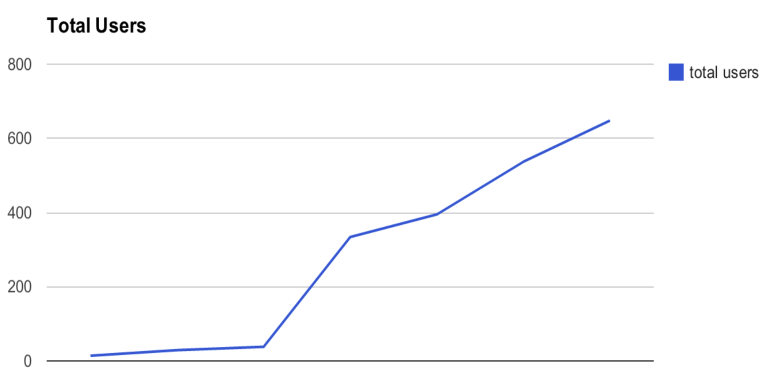
Discuss on Hacker News

Two companies

Alpha Labs: total signups after 6 weeks: 1995

Beta Works: total signups after 6 weeks: 1995

The "up and to the right graph" is identical for both of these companies. This is the image they show to their investors and advisors to get people excited.



It looks like they've both got good traction. So which do you invest in? Can we dig a little deeper?

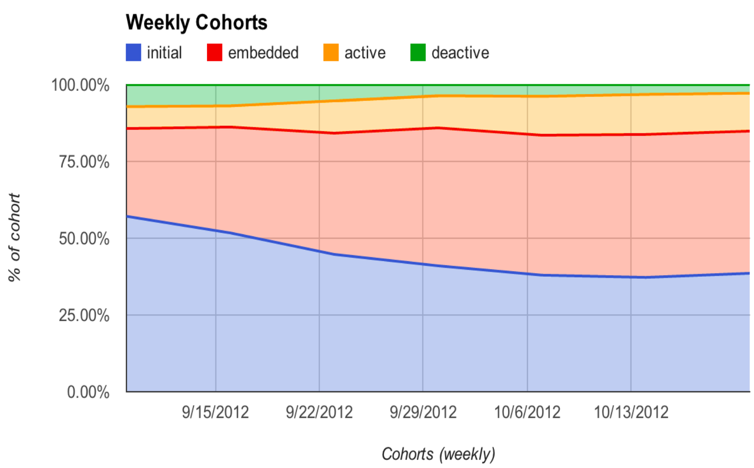
Well what if I told you that Alpha Labs has 242 active users and Beta Works only has 26 active users? Now it seems obvious which is doing better. Where did Beta Works go wrong?

The problem

While both companies invested in Adwords, Content Marketing, and Social Media, Alpha Labs made sure their conversion rates remained constant as they scaled. This means that as they added new features to their product and improved it they constantly conducted cohort analysis to make sure that the same proportion of users weekly were being converted at each stage of their funnel.

This is a critical aspect of building a product. If your conversion rates drop as you scale up, something isn't correctly automated.

Scalable: A healthy cohort report



So boring

This chart looks a lot more boring than the first one. There is no "up and to the right". In fact, it almost looks like things have plateaued. This is the strength of a cohort report. It's deceptively simple.

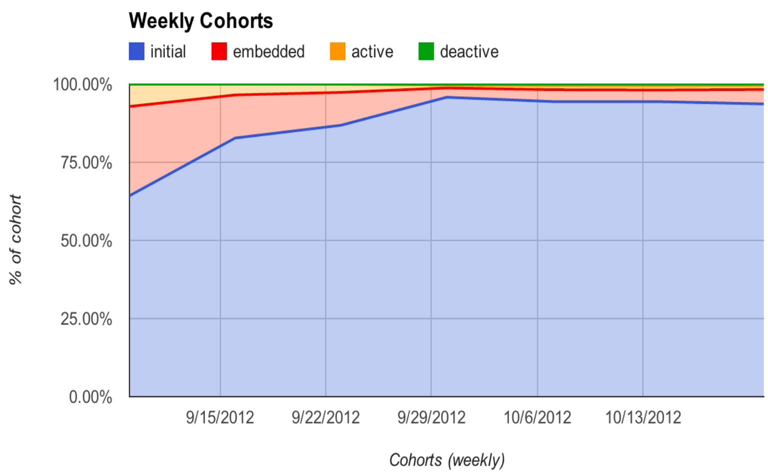
Every product has a lifecycle, it's probably something like ours, but note that each state is mutually exclusive, a user can only be in a single state at a time.

How to read it

Each point on the X axis represents a group of users who signed up during that week. So 9/15/2012 shows all of the users who signed up during that week. The Y axis represents the percentage of users inside a cohort that are in a given state.

I'm sure by now you've guess why this chart is so valuable. It removes all the bias of a growing user base and solely focuses on how many users per cohort you're converting to the next stage of the funnel. This allows the product team to really focus on making each feature in the app actually drive these metrics.

Unscalable: A sick cohort report



It's pretty plain to see what went wrong. Early on Beta Works was virtually identical in conversion rates to Alpha Labs but as they started to pour on the advertising dollars they couldn't keep up with the demand. The proportion of users at each stage of the funnel declined.

How do we avoid this?

Declining conversion rates is a sign of poor scalability. Immediately throttle back your marketing spend and focus on improving your product.

Thank you

Feel free to take a look at how these calculations were done via this google doc spreadsheet.

-Cameron Westland

TWEET EMAIL

Non-tech Cofounders – Don't Hire an Agency

11 OCTOBER 2012

Discuss on Hacker News

Introduction

This article falls into the “advice for non-technical cofounders” category. So if that’s you, I hope you find my two cents helpful. This article also touches on the relationship between startups and agencies. I’ve recently made the leap from being the non-technical cofounder at a web dev services company to cofounding a startup called Kera.

Strange Bed Fellows

I’m starting to question the wisdom of startups engaging agencies to play a critical part in building their companies. At first glance it’s pretty simple: founders are trying to mitigate the absence of expertise – mainly in the area of technical or user experience expertise. It seems natural that startups would jump at the opportunity to fill in these gaps.

But I’ve come to believe that the interests cannot possibly be aligned. Agencies are built to sell time, maximize hourly rates, increase project timelines, and build their reputation for quality. Startups, on the other hand, are built to discover business models, fail quickly and repeatedly, then scale their operations after various systems starts to “stick.”

This is a Contradiction

Early stage startups have three critical pieces: design, development, and marketing. Each of those pieces have to advance hand-in-hand for a startup to transition across the chasm and into the holy land. They are all equally important activities, and they deserve equal attention.

Yet somehow it’s ok to outsource the UX and development while the founder(s) focus(es) on raising capital or developing the business. Here the deal: if you wouldn’t outsource the vision of your product, you shouldn’t outsource its execution, because those two aspects are inextricably linked. One shifts the other.

Let’s get more specific. How, exactly do Agencies hurt startups? By serving them.

Agencies are Expensive

Hiring an agency will accelerate your burn rate considerably. It’s simple economics – their hourly rate is probably 3-4x what a founder would need to draw in salary. The more expensive your time is, the riskier change becomes.

Agencies also like predictability because resourcing a services company is very difficult. In fact, they create all sorts of processes that attempt to foster and increase predictability. But you just embarked on a very unpredictable endeavour.

And if you’re doing an equity deal, you’ve essentially given away equity at an inflated rate than you would have to a founder.

Outsourcing Tech and UX is Debilitating

I think agile development is more than just delivering new features at the end of an iteration. To me, agile is about pushing new code to end-users early, and refining features continuously. Unfortunately, most of the agencies I know try to get it right before they get it out.

I'm not blaming agencies — they build their reputation on getting it right. Unfortunately, that's not how it works. As my good buddy Helmuth Karl Bernhard Graf von Moltke used to say, "no plan survives contact with the enemy." In our case, the "plan" is what you build before you release it, and "the enemy" is a very unkind marketplace.

I also hope that these founders understand how much technical debt they're accumulating by outsourcing their development. Hopefully it's within your tolerance. But I'd hate to be the person that launches an app with UX gaps and bad (or no) test coverage.

Conclusion

I'm not writing about solutions on this post. Ian over at 10sheet.com has written a great article about how non-technical cofounders can build an engineering team. He's a sole founder, but his practical advice can also be used to find a technical person who can become your cofounder. *UPDATE*: Seems like the blog post was taken down.

If you're thinking about hiring an agency, I get where you're coming from: You probably just want to get started as quickly as possible. But the perceived short-term gain comes with a lot of strings attached.

-Max Cameron

TWEET EMAIL

Don't be a Poser

9 OCTOBER 2012

Discuss on Hacker News

"The best advice I have to give you, is to find someone a few steps up the ladder from you. Grab on to their coattails and let them pull you up." — My buddy's grandfather

Building relationships with founders that are more successful than you is huge. Their advice and mentorship means the world. But they have to buy into who you are if they're going to pull you up the ladder with them. When you meet a founder like this, they take a quick look at you and decide: Is this person a founder or a phony? Being perceived as a founder can open serious doors for you. Being perceived as phony can freeze you in your tracks.

Luckily it's your choice which bucket you want to be thrown into.

What is a phony?

Let's consider the question that an someone "higher up the ladder" asks themselves when you're introduced.

1) Is this person worthy of my attention or are they wasting my time? Lots of people want to help, but they want to help the right people.
2) Will they help me or harm me? Are they an asset or a liability? Is this person going to throw my name around like we're BFFs? Will they call me every fifteen minutes looking for advice?

These questions are answered by passing you through a few filters they've come to rely on. They'll want to know, are you a first time founder? Have you raised yet? Who do we both know? Are people talking about you? Are people talking about your product? In other words, they can make a pretty good decision about which bucket you fall into in about five minutes.

For some reason, I see a lot of people who mess this up. Here's a few phony smells:

- You pitch at parties. "I noticed you were talking about email. I'm building a brand new email platform that blah blah blah." Come on bro let me drink this beer.
- You ask for investor intros prematurely. "Nice to meet you. Roger invested in your company? Nice! Can you intro us? I'm up for a call right now." Come on bro you gotta be kidding.
- You're not full time on your product. "I'm waiting to raise my first round before I jump ship."
- You brag about insignificant accomplishments — "My codebase has 150k lines!!!" That sucks man.

Why does it matter?

Here's the bottom line: influential people have to separate signal vs noise. They can't help everyone that needs help, and they want to be responsible for backing winners. If you're noise, you're going nowhere with these people. It's not that you're a bad person, you just don't have the prerequisites.

And this sucks because connections make the world go round. So here's a tip if you're getting thrown in the wrong bucket: Step down a few rungs on the ladder.

-Max Cameron

TWEET

EMAIL

Taige Zhang is a Keranite!

6 OCTOBER 2012

This week Taige (pronounced Tiger) joined the team at Kera. His specialty is marketing and he'll be focused on optimizing our funnel and helping generate leads.

In his free time he likes to travel to new places, swim, and sail.

Follow him on Twitter

-Cameron Westland

TWEET

EMAIL

Rant Against Surveys

5 OCTOBER 2012

Quora user research = weaksauce

Interestingly enough, I got this email yesterday:

Hi Max — I am reaching out to people on Quora to better understand a particular part of our product, credits. We noticed that you recently used our site and wondered if you'd take a minute to take a quick 1-question survey. Thanks so much for your time. Best, Sumi Quora User Researcher

The really shocking part was the survey itself. They basically asked me why I don't use the credit feature. I was asked to rate the following reasons from 1-3:

- There are no features or rewards to "unlock" with credits
- I don't understand the credits system
- Credits are ok, I'm just not really motivated by them
- Credits aren't shown publicly
- There isn't much to spend credits on
- I don't like the credit system

There are so many problems with this approach to user research, I don't even know where to begin. Indi Young would barf if she saw this. I thought Quora was savvy, and would use some of the plentiful best practices available to all of us. Instead, they're getting all amateur hour on us.

They had an "other" section where you could leave a comment. Instead I left them this link: http://rosenfeldmedia.com/books/mental-models/blog/oxymoron_scientific_survey

- Max Cameron

TWEET EMAIL

You Can't Delegate Customer Development

3 OCTOBER 2012

Discuss on Hacker News

Welcome to Camp, Jimmy

I'm noticing a trend where startups are delegating customer development activities to lower level employees, and in some circumstances, interns. I don't think there's a role for interns in a startup that hasn't found product market fit.

Not only have authors like Blank explicitly said it's a bad idea, it contradicts Customer Development on a lot of levels. I thought I needed to speak up, especially when Ries is giving it the thumbs up.

Consequences

CustomizeDashboard

But hey, I'm a busy founder — I have this cap table that needs to be filled up, one of my devs just quit, I'm flying to SF in two weeks and we're a month out till launch. It's no big deal if I get an intern to help me out with some interviews and some metrics."

Wrong, mi amigo.

Customer Development was built to radically change your business model. Spending time with customers and analyzing your metrics should directly impact every aspect of your business - from positioning to feature prioritization to acquisition strategies.

So let me ask you this question - would you switch up your entire feature set based on the recommendation of a non-founder? I believe that if you're not acting on the data being collected, you're wasting time and making busy work. For what reason I simply cannot fathom. Like you said, you're busy enough.

Stop the Waste

Look friends, do yourself a favour and don't waste your time hiring anyone — let alone interns — unless you've found product market fit. They'll only slow you down when you need to act fast. When you play the game of startups, you either ship or you die.

Footnotes:

- Blank, 2007, pg 38: "Customer Development must have the authority to radically change the company direction, product or mission and the creative flexible mindset of an entrepreneur."
- Blank, 2012, pge 56: "This critical task can't be assigned to junior staffers and must be driven by founders."

- Max Cameron

TWEET EMAIL

You’re Not That Busy

29 SEPTEMBER 2012

Discuss on Hacker News

Have you ever noticed how people love to take the time to tell everyone that’ll listen about how busy they are? We all know it’s a douche move, yet it happens to the best of us.

I remember meeting a pretty cool founder when we went to Startup Festival in Montreal this summer. Turns out we had a few mutual connections and we realized we were both working in Toronto. During one of the festival parties, we decided to get together for a coffee back in Hogtown.

A week or so later I sent the founder an email asking when he wanted to get together. It went something like this:

Me: Hey Joe, I’m super heads down this week getting some shit done but I’d really love to get together with you next week.

Joe: Yeah man we’re super heads down too man, getting this release out the door soon. We should probably push it back for a bit, how’s about three weeks from now?

Me: Wait. Are you going to Zak’s thing tonight?

Joe: Lol. See you there.

Look, I know we’re all busy people. But I also felt like a total D telling Joe how “heads down” I was. I think we should all do ourselves a favour, get over ourselves, and stop trying to impress our peers.

It’s taken me a while to kick myself out of the habit of telling anyone how busy I am. Now, when someone asks how things are going, I just say, “They’re going great.” Which is a whole other lie.

- Max Cameron

TWEET EMAIL

How Retrospectives Help

25 SEPTEMBER 2012

A retrospective is a shared opportunity to reflect on the past in an effort to improve the future. Every Friday afternoon, we've been doing one-hour retrospectives at our office for more than a year now, and they're one of the most valuable practices we've picked up. A lot of founders we know have asked me how we run them, so we thought it'd be useful for other members of the community.

Formats: Retros are organic - let them evolve.

Sticky Notes: One of the first exercises we ran was to hand out sticky notes to the team, and ask them to brainstorm anything that made them happy during the week. Then we did the same exercise but asked the team to brainstorm what made them unhappy. After grouping together all the similar unhappy sticky notes, we got a very clear idea of the areas we needed to improve around the office.

Productivity Scores: Sometimes we distribute sticky notes and ask the team members to rate their own productivity and the team's overall productivity on a scale from 1-5. The numbers aren't really important, but they get people talking about what held them back and what pushed them forward.

Demos: We've always reviewed our accomplishments to kick off our retro, but as time progressed, we got tired of just talking about code. So we bought a TV and started doing demos of everything that shipped. It's a fun way to kick off the retrospective, but more importantly it instills our value: ship or it didn't happen.

Unstructured chats: As time went on, we all felt a little bit of "activity fatigue". Once a team gets used to a lot of structured recipes, it's awesome to let the feedback flow freely. This wouldn't be the best way to run your first retro, because it assumes a certain level of openness, honesty and respect.

The unifying factor: Experiments

No matter what format the retro has taken, we've always used the opportunity to come up with experiments that we run the following week. If they're successful, we keep them around. If they don't end up paying dividends, we let them go. Some examples of successful experiments at our office include:
2pm standup meeting: Takes five minutes, meant to remove bottlenecks and allow the team to ask for help.
Daily exercise: After our standup, we all do a brief exercise as a group to get the blood flowing.
Asynchronous working environment: Work wherever you want, whenever

you want.

Some reasons you might want to run a retro: How will you know it's time to start running retros at your startup? One sign is that your team is growing and peoples' relationships are starting to become fragmented. Remember how you all used to hang out on the weekend when you were a five person team? Yeah, that.

Also, if you're starting to notice conflict between your team-members, be it overt arguments or passive aggressive comments. And finally, when you spot significant disagreement in your team's opinions about workflow and other processes, this is a great way to get them on the table.

Benefits

Here's four reasons you'll thank yourself for getting these started:

- Resolve Conflicts: There's nothing like putting an argument to bed, and heading home for the weekend looking forward to Monday.
- Bonding: We definitely trust each other more when we're communicating and sharing stuff openly
- Workflow Improvements: We've refined our pairing techniques, switched tracker apps, and started working asynchronously as retro experiments.

- Max Cameron

TWEET EMAIL

What Can You Learn from Churn

22 SEPTEMBER 2012

Discuss on Hacker News

The answer: So much more than our vanity is worth.

Lean Grief

Shit happens, customers churn. But you have to admit, it hurts. Especially when the customer churning is one you really wanted to make happy. You get a sinking feeling, which can lead to that dark place that no founder wants to go.

When we lost one of our first really cool customers, I started to pay attention to the feelings I was having and noticed it's very similar to experiencing accelerated grief. Here's how it breaks down.

1) Shock & Denial
This is that first sinking feeling I was telling you about. Since we're still early on with Kera, we don't find out a customer churned from some table in a report. When you build real relationships with your customers, you find out about churn from a person. And that makes the experience especially real.

2) Pain & Guilt
Next, it's time to blame yourself for their leaving. You start second-guessing every move you've made in the past thirty days. Maybe I messaged them too much. Maybe not enough. Perhaps we let them in too early. We definitely should have built that extra feature before letting them come on board.

3) Anger & Bargaining
At this point, you're throwing darts at a picture of your ex-customer's logo. How dare they leave us! Don't they understand exactly how worse off they'll be without our service? Whatever. We're too good for them anyway.

Wait. Maybe if I give it to them for free maybe they'll come back.

It's bad. But it's about to get worse.

4) Depression, Loneliness
This is when The Struggle happens. You close up. You start thinking crazy things about why you started a company in the first place. This startup business is garbage. In fact I should be a garbageman. So I can live with my friend, the garbage.

5) The Upward Turn
Something usually has to happen here to knock you out of whatever dark place you were just visiting. Maybe one of your mentors takes you out for a few beers. Perhaps you go off-grid for a whole weekend with your significant other. Maybe you get a cold call from an investor you respect. Or, maybe you get a few easy technical wins and delight a few more of your existing customers.

Luck is a two-sided coin and sometimes good things happen. Not often, but eventually. This is when you start thinking about your loss a little less than before.

6) Reconstruction and Working Through
Now we're getting back into the swing of things, shall we say. We're getting back into our rhythm. Now is the perfect time to get over ourselves and ask for honest feedback from the customer who left you.

We make a point to reach out to every customer that churns from Kera. There's so much to learn, even if it hurts.

7) Acceptance and Hope
We're never going to bat a thousand and retain every customer. It's useless to train and hit an arbitrary goal. But if you can get a benchmark of where you're at, and move that number upwards every time you ship code (even if it's just a little), at least we're setting ourselves up for success instead of failure.

Even when shit happens.

- Max Cameron

TWEET EMAIL

Failing Shamelessly

20 SEPTEMBER 2012

Customer Development and Failure

We really buy into customer development. It's helped us learn directly from customers instead of assuming we had all the right answers, it taught us that metrics are just as important as intuition, and ultimately, it helped us discover a problem worth solving.

But along with all the good, there are some bitter pills to swallow. And even though they help us way more than they hurt us in the long run, it didn't prevent our initial attempts at building a product from being excruciating, demoralizing failures.

Here's why:

- Lean embraces failure as a form of learning
- Lean embraces getting out of the building
- Therefore, Lean embraces public failure

Public Failure Sucks

When we started learning about cust-dev and putting it into practice, I remember looking at other T.O. startups that demonstrated a tremendous amount of, um, perseverance in their approach to building a startup. I was jealous of these people because it seemed like they had it figured out.

When I talked to other founders, I only heard stories about how great things were going. I saw them hiring new employees every month, putting marketing dollars to work, and being patted on the back by the usual pundits.

Then there was us, heading out of the building with yet another set of wireframes, yet another product idea, and yet another two promises. At first it was analytics for server logs, then a social CRM tool for coffee shops, and analytics for your cellphone, and then it was a competitor to Stack Exchange. And then it was another. And another.

The Doubt

We played by the rules, ran our experiments, and built our MVPs. Every time we thought we had something sticky, we'd get GF'd by our earliest adopters.

The worst part about it was knowing that our peers were making progress while we floundered. They were persevering while we were pivoting, and they were having a blast while we were in The Shits. That's what my old boss called it.

When you're in the very earliest stage of a startup, the fluctuations are extreme. Highs are higher, lows are lower, and generally speaking, we had more lows than highs.

The Moral of the Story

Then something crazy happened: We finally discovered our problem. Then we found more people who have that problem. And it turned out that those people are awesome people that we love to serve. A nasty cycle started turning into a virtuous cycle.

I also started meeting more founders, and learning more about what's really happening inside their startups. I learned that the people I thought were killing it felt just as lost as we did. I learned that press or investors doesn't equal success.

I learned that even the most confident people had doubts on the inside. And a few of them even told me they admired us for putting ourselves out there, not settling for a shitty product idea, and picking ourselves up and sprinting up the hill.

And it never would have happened if we didn't repeatedly fail in a very public fashion. So here's what I have to say if you're in The Shits right now: Be strong. Fail Shamelessly. Do it publicly. It's all worthwhile.

- Max Cameron

TWEET EMAIL

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