UserOnboard.com

Onboarding UX Checklist

Before Signup

- ☐ Touchpoints have a consistent narrative thread from one to the other

- ☐ Each touchpoint helps the user accomplish something they actually want to do

- ☐ The touchpoints promise an improvement to the user's life ("whoa, I…")

- ☐ That improvement's positioned within the context of their current situation (frontload the "aha moment")

- ☐ Points of anxiety & struggle are directly addressed wherever they arise

- ☐ The product's personality is engaging and consistent across the board

- ☐ The product's credibility is established with social proof, testimonials, and real-world outcomes it generates

- ☐ All unnecessary points of friction and distraction are removed from critical workflows

After Signup

- ☐ The first-run experience leads to a specific, relevant, meaningful "quick win"

- ☐ The workflow for the first-run experience is as streamlined as humanly possible

- ☐ Users' time spent floating in "limbo" states is managed & limited

- ☐ If coach marks & tooltip tours are used at all, they're primarily to spur activity, not point at buttons

- ☐ Blank states and preloaded content are self-descriptive and helpful

- ☐ Social cues are provided to indicate highly-valued behaviors

- ☐ Key early use activities are explicitly called out, in the form of to-do lists or completion meters

- ☐ Completed tasks are reciprocated with a success state

- ☐ People are incentivized to form social bonds with others, and thus become more accountable for ongoing use

- ☐ Lifecycle emails are positioned to act as catalysts driving return visits