

CASE STUDY

QuickStaff

ONBOARDING.PRO

BACKGROUND

QuickStaff helps businesses manage their part-time staff

The product solves the pain of coordinating staff for events like weddings, photo shoots, etc. It's meant to be extremely simple without requiring long setup from part time staff.

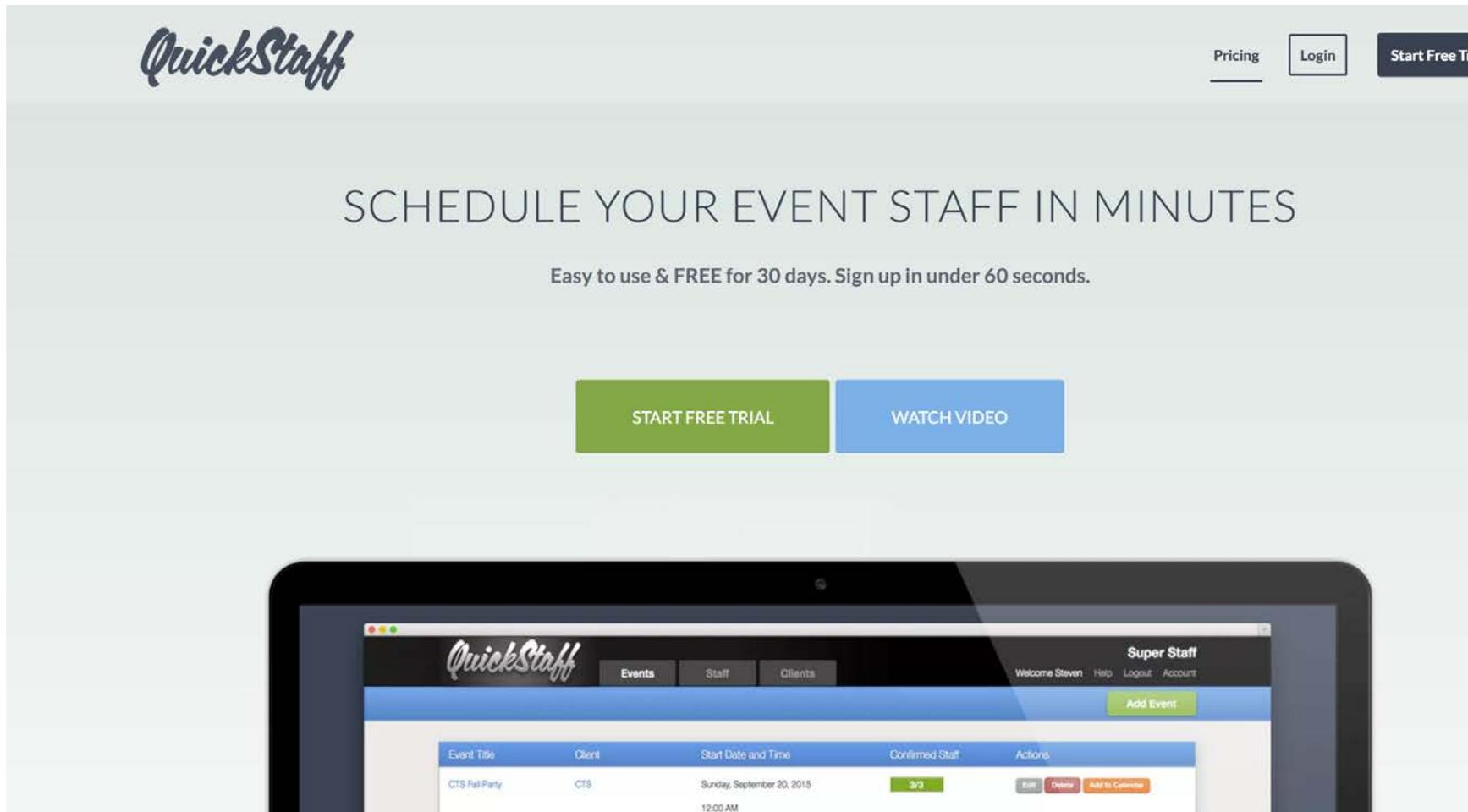
PROBLEM

Poor conversion of newly signed up users

The product is appealing and offers simplicity without unnecessary extras. However, many first time users would struggle with initial set up. This would lead to prolonged product adoption and customer hand holding.

BEFORE

Original sign up flow: Landing page



BEFORE

Original sign up flow: Registration

Happy Wednesday. Recommend Share 330

Savings FAQ Back

QuickStaff

Start scheduling your staff in seconds.

Try out QuickStaff for FREE for 30 days. NO Contracts. NO Commitment.

Create Your Free QuickStaff Account

Your Company Name (required) <input type="text"/>	Your email (required) <input type="text"/>	<p>Others are spending <i>less time</i> on organizing staff for their events, and <i>saving money</i>...</p> <p>Start using Quickstaff TODAY</p>
First Name (required) <input type="text"/>	Your password <input type="text"/>	
Last Name (required) <input type="text"/>	Please confirm your password <input type="text"/>	

BEFORE

Original sign up flow: User workspace

The screenshot displays a user's workspace in the QuickStaff application. A modal window titled "Event Details" is open, providing a "Getting Started" guide. The background shows the user's profile information and account settings.

QuickStaff Onboarding Company

Welcome Test Support Logout Account

Add Event

My Account

Profile Settings Billing Co

Test Ron

Onboarding Company

Email: onboardingbot+1@gmail.com

Telephone:

Mobile:

Timezone: Atlantic Time (Canada)

Account Standing: You have 29 days and 23 hours left of your trial period

Edit your profile or change password

Available sign in methods

Event Details [Close]

Getting Started

Step 1: Add your Staff
Add your team members [here](#), so you can schedule them.

Step 2: Add an Event
Add an upcoming event [here](#), picking the staff you want to schedule for that event.

Step 3: Go Relax
Quickstaff will notify your selected team of the new event details, and keep you informed of who can work. You can replace staff who decline a job with others later.

Let's Begin >>

Close

Batsirai from QuickStaff
Hi there Welcome to QuickStaff
Easy Way Click here for a short

Batsirai from QuickStaff
Do you need any help entering
How can I help you?

ANALYSIS

Initial set up hinders adoption

Initial sign up flow was built around adding staff contacts first. However, most users would want to see the value first. I.e. before committing to the work of adding staff, they want to see how the product actually works.

SOLUTION

Showcase the product by turning set up into a demonstration

The entire marketing promise is around speed and starting in seconds. I designed the new flow around creating the first event.

Additionally, this process is presented as a wizard breaking down multiple decisions into several screens to simplify progress.

NEW FLOW

The first step simplifies set up by providing options for most common customer types. Each option prefilled with common settings.

Product

Select your business type 1

This will help us tailor the product to your needs, such as selecting appropriate staff roles.

2

 Catering	 Event planner	 Film crew
 Photographer	 Trade show coordinator	 Medical team
Other		

Continue

NEW FLOW

Demonstrating product features through set up. Can easily be filled with dummy data

Product 3 Help Log out

1 1 Event details 2 Event location 3 Schedule staff 2

Enter event details

Event name
e.g. Acme staffing

5 Client Test client 6 Event administrator John Johnson

Start date April 17, 2017 5:00 PM End date April 17, 2017 9:00 PM

Is this on all day event?
 Yes No

Remind staff 3 days before event starts

Notes for staff Pigsford tavern just off I-105, exit 34B

Notes for administrator (not seen by staff) Something important...

Attachments
Click to add e.g. Schedule Click to add e.g. List of items Click to add +

4 Add event location

NEW FLOW

Adding staff is now the final step, and can be easily completed or skipped.

Product

Help Log out

Event details Event location 3 Schedule staff

Schedule staff

This event requires:

- 1 0 + Cooks Edit role 2
- 0 + Bartenders Edit role
- 0 + Waiters Edit role
- 0 + New role

Available staff:

1 3

We've listed you as one of staff for demo purposes. [Import your real staff](#) to invite them to this event. Or skip for now and preview staff email and event page first.

- Cooks Default coll time 5:00 PM Invite all

User Name Call time 5:00 PM Uninvite

Email invitations to staff Preview email 4

Create event & invite staff

NEW FLOW

Addressed a common concern for new users: How does staff invite looks?

🔄 Product

Check your email

We've sent you an email with an invitation to this event. You'll see how staff invitations look and can accept or decline straight from the message.

[To event page](#)

NEW FLOW

The flow results in a unit of value – a created event. The new user now has gone thorough the steps of creating one and can repeat them now for an actual event or easily edit this one.

The screenshot shows a web application interface. At the top, a notification bar displays a user icon, the text "User Name confirmed for Jenkins wedding", a blue circle with the number "2", and a close button (X). Below this, the main content area features a navigation bar with "Product" (with a refresh icon), "Events", "Staff", "Clients", "Account", "Help", and a "Log out" button. The "Events" section is active, showing "List view" and "Calendar view" options, and a "+ New event" button. A table lists events with columns for Event name, Client, Date, Confirmed staff, and Actions. The first row shows "Jenkins wedding" for "Jim & Nancy Jenkins" on "April 17, 2017 (Sat) @ 5:00pm" with "1/5" confirmed staff. A blue circle with the number "1" is positioned at the bottom center of the page.

User Name confirmed for Jenkins wedding 2

Product Events Staff Clients Account Help Log out

Events List view | Calendar view + New event

Event name	Client	Date	Confirmed staff	Actions
Jenkins wedding	Jim & Nancy Jenkins	April 17, 2017 (Sat) @ 5:00pm	1/5	Edit Add to calendar Print Delete

1

SYNOPSIS

Learning by doing

The new flow trains a new user on the product by creating the first event and delivers the Aha! Moment as a result.

This closes the loop of promising value – delivering value. Now that the first unit of value has been delivered, there is an initial trust in the product. This user is more likely to stick around and continue exploring other features.

CONVERT MORE CUSTOMERS WITH
BETTER USER ONBOARDING

ONBOARDING.PRO