



USER ONBOARDING FOR STARTUPS

QUICK GUIDE

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ABOUT THIS GUIDE

**THIS GUIDE IS NOT A BOOK,
IT'S A CHEAT SHEET**



WHAT IS USER ONBOARDING?

WHAT IS USER ONBOARDING?

IT'S HOW TO GET YOUR
USERS TO SUCCEED WITH
YOUR PRODUCT

WHAT IS USER ONBOARDING?

USER ONBOARDING =

MORE USERS

CONVERT INTO CUSTOMERS

FASTER

WHAT IS USER ONBOARDING?

**USERS DON'T CARE ABOUT
YOUR PRODUCT**

THEY CARE ABOUT THEM

WHAT IS USER ONBOARDING?

**USERS HIRE YOUR
PRODUCT TO SOLVE THEIR
PROBLEM**

WHAT IS USER ONBOARDING?

**THEY NEED TO SEE YOUR
PRODUCT SOLVES THEIR
PROBLEM**

AND SEE IT QUICKLY

WHAT IS USER ONBOARDING?

USER ONBOARDING =

**HELPING USER SEE YOUR
PRODUCT SOLVES
PROBLEMS**

WHAT IS USER ONBOARDING?

USER ONBOARDING =

HELPING USER WIN

FIRST TIME (S)HE USES YOUR

PRODUCT

WHAT IS USER ONBOARDING?

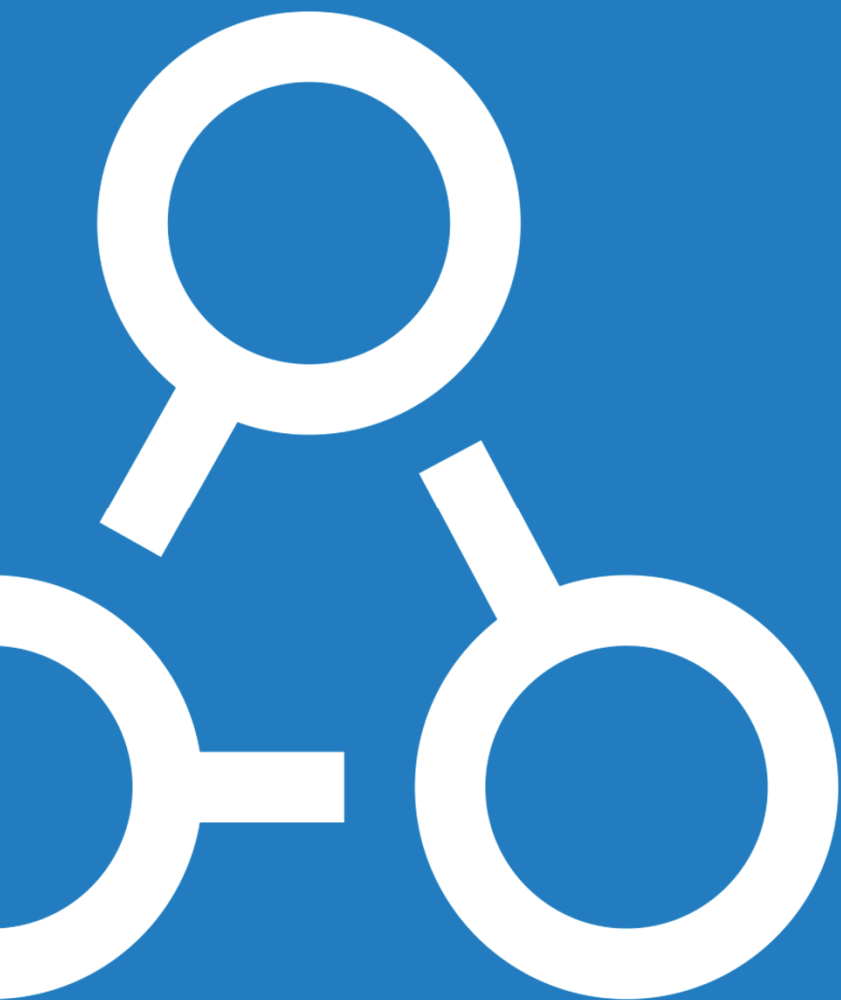
USER ONBOARDING =

**DELIVER ON YOUR
MARKETING PROMISES
(EVEN JUST A LITTLE)**

**RIGHT AFTER SIGN UP SO
USERS STICK AROUND**

WHAT IS USER ONBOARDING?

**MARKETING GETS SIGN UPS,
ONBOARDING CONVERTS**



3 STEPS TO USER ONBOARDING

3 STEPS TO USER ONBOARDING

STEP 1:

LEARN ABOUT YOUR USERS

3 STEPS TO USER ONBOARDING

STEP 2: DESIGN AND TEST YOUR ONBOARDING FLOW

3 STEPS TO USER ONBOARDING

STEP 3: MEASURE PERFORMANCE AND ADJUST

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STEP 1
DO YOUR HOMEWORK

STEP 1: DO YOUR HOMEWORK

LEARN ABOUT YOUR USERS

STEP 1: DO YOUR HOMEWORK

**HOW DO THEY DEFINE
THEIR PROBLEM?**

IN THEIR OWN WORDS

STEP 1: DO YOUR HOMEWORK

**HOW DO THEY GOOGLE
THEIR PROBLEM
(SOLUTION)?**

STEP 1: DO YOUR HOMEWORK

**HOW MUCH DO THEY KNOW
ABOUT YOUR PRODUCT?**

**WHAT EXPECTATIONS THEY
ARE COMING WITH?**

STEP 1: DO YOUR HOMEWORK

**WHAT OTHER PRODUCTS
DO THEY USE?**

**i.e. WHAT INTERFACES ARE
FAMILIAR TO THEM?**

STEP 1: DO YOUR HOMEWORK

**HOW DO THEY DEFINE
SOLUTION TO THE
PROBLEM?**

STEP 1: DO YOUR HOMEWORK

**WHAT DEMONSTRATES
SOLUTION FOR THEM?**

**WHAT NEEDS TO HAPPEN,
STEP-BY-STEP?**

STEP 1: DO YOUR HOMEWORK

**WHICH FEATURE OF YOUR
PRODUCT WILL
DEMONSTRATE THE
SOLUTION BEST?**

STEP 1: DO YOUR HOMEWORK

**WHAT IS THE VERY FIRST
USER SUCCESS POINT IN
YOUR PRODUCT?**

**i.e. WHAT WILL MAKE USER
SAY: IT WORKS, OR BETTER
YET: WOW! THIS IS
AWESOME!**

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STEP 2
DESIGN IT

STEP 2: DESIGN IT

BEGIN WITH SKETCHES AND WIREFRAMES

Pen & Paper

<http://moqups.com>

STEP 2: DESIGN IT

YOUR JOB IS TO CREATE A
STRAIGHT PATH FROM SIGN
UP TO SUCCESS POINT



LANDING PAGE



REGISTRATION



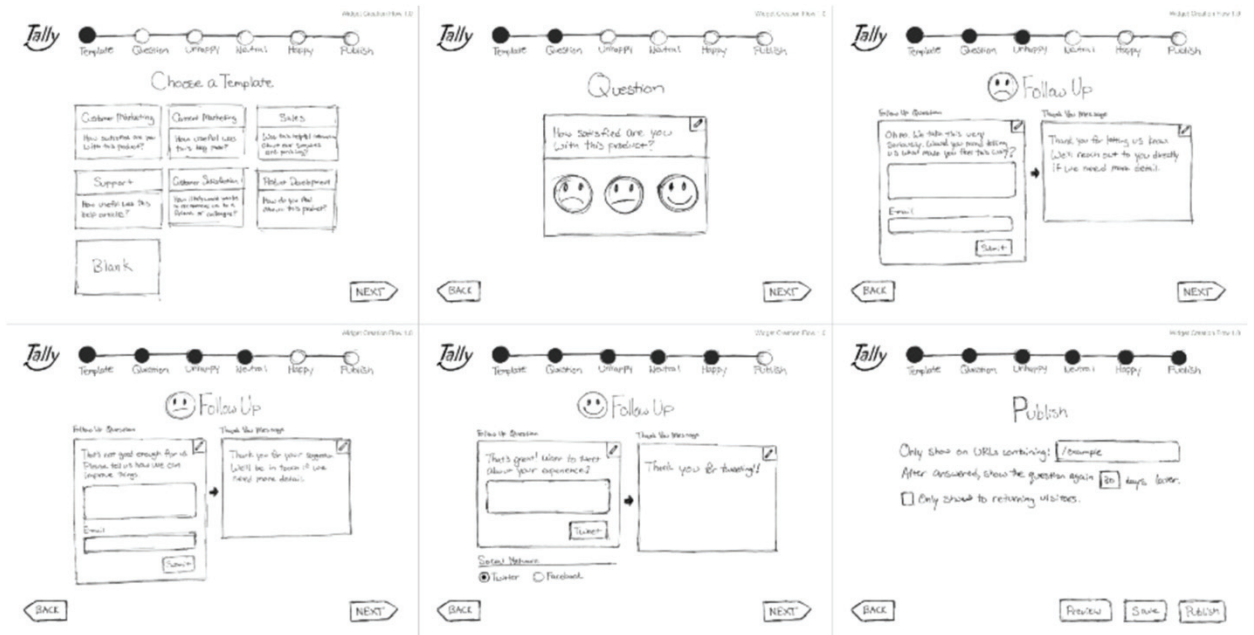
ACTIVATION:
1ST VALUE



ENGAGEMENT:
RECURRING
VALUE

STEP 2: DESIGN IT

MAP USER JOURNEY FROM SIGN UP TO SUCCESS, SCREEN-BY-SCREEN



STEP 2: DESIGN IT

**TRY TO MAKE IT AS SHORT
OF A JOURNEY AS POSSIBLE**

STEP 2: DESIGN IT

**HELP USERS ACHIEVE GOAL
WITH MINIMAL EFFORT**

STEP 2: DESIGN IT

A FEW TIPS

STEP 2: DESIGN IT

MAKE SIGNING UP EASY

**DO YOU REALLY NEED ALL
THAT INFORMATION
UPFRONT?**

STEP 2: DESIGN IT

BREAK UP LONG TASKS

**IF YOU NEED A LOT OF
ACTIONS, BREAK THEM
DOWN INTO SEVERAL
SEQUENTIAL SCREENS**

STEP 2: DESIGN IT

EXAMPLE:

Virgin's new booking site

One decision at a time makes
it **faster**



STEP 2: DESIGN IT

REMOVE DISTRACTIONS

IF A FEATURE DOESN'T GET
USER CLOSER TO GOAL
HIDE OR DEEMPHASIZE IT

STEP 2: DESIGN IT

EXAMPLE:

Buffer's onboarding process

 buffer



Connect your first social account!

Buffer helps you schedule content to multiple social accounts from one simple dashboard. Connect your first account to get started:

 Twitter

 Facebook

 LinkedIn

STEP 1 OF 5: ADD SOCIAL PROFILES

STEP 2: DESIGN IT

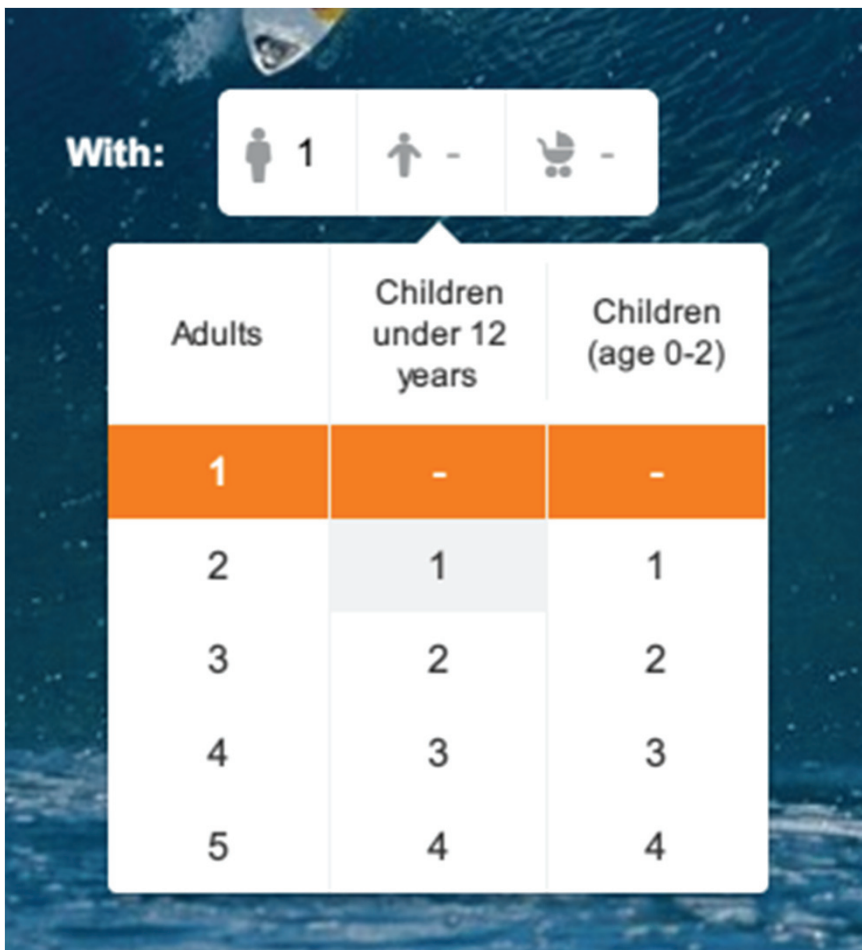
SIMPLIFY INTERACTIONS

**MULTIPLE CHOICE VS.
MANUAL INPUT**

STEP 2: DESIGN IT

EXAMPLE:

[Try booking at Tripmydream](#)



The image shows a booking interface with a 'With:' section and a table of options. The 'With:' section has three columns: 'Adults' with a value of 1, 'Children under 12 years' with a value of '-', and 'Children (age 0-2)' with a value of '-'. Below this is a table with three columns: 'Adults', 'Children under 12 years', and 'Children (age 0-2)'. The table has five rows of options. The first row is highlighted in orange and shows 1 Adult, 0 Children under 12, and 0 Children (age 0-2). The second row shows 2 Adults, 1 Child under 12, and 1 Child (age 0-2). The third row shows 3 Adults, 2 Children under 12, and 2 Children (age 0-2). The fourth row shows 4 Adults, 3 Children under 12, and 3 Children (age 0-2). The fifth row shows 5 Adults, 4 Children under 12, and 4 Children (age 0-2).

| Adults | Children under 12 years | Children (age 0-2) |
|--------|-------------------------|--------------------|
| 1 | - | - |
| 2 | 1 | 1 |
| 3 | 2 | 2 |
| 4 | 3 | 3 |
| 5 | 4 | 4 |

STEP 2: DESIGN IT

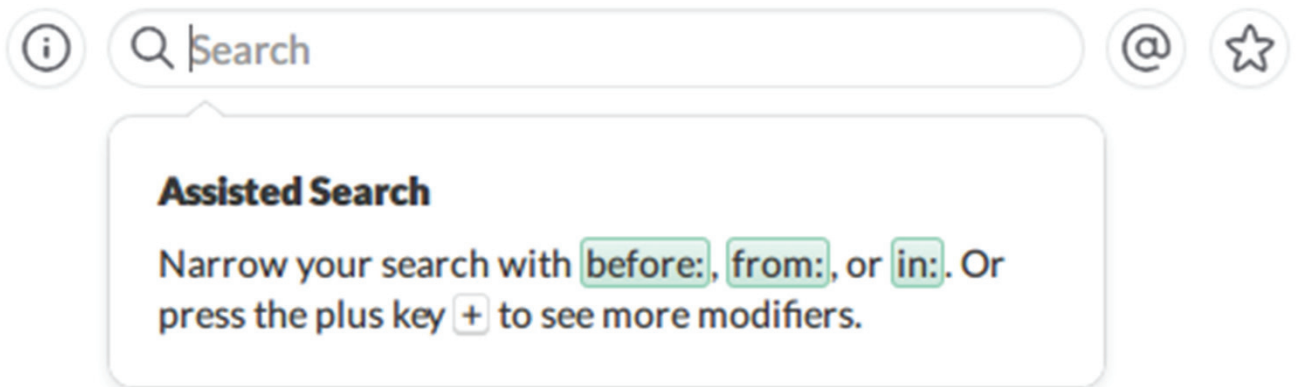
**ANSWER USERS' "WHY?"
QUESTIONS**

**PROVIDE RELEVANT
INFORMATION IN CONTEXT
OF THE PAGE OR TASK**

STEP 2: DESIGN IT

EXAMPLE:

Slack's search tips



STEP 2: DESIGN IT

**ALWAYS SHOW WHERE TO
GO NEXT**

**PLACE TOOLTIPS OR
SIGNAGE TO INDICATE
WHAT TO DO NEXT**

STEP 2: DESIGN IT

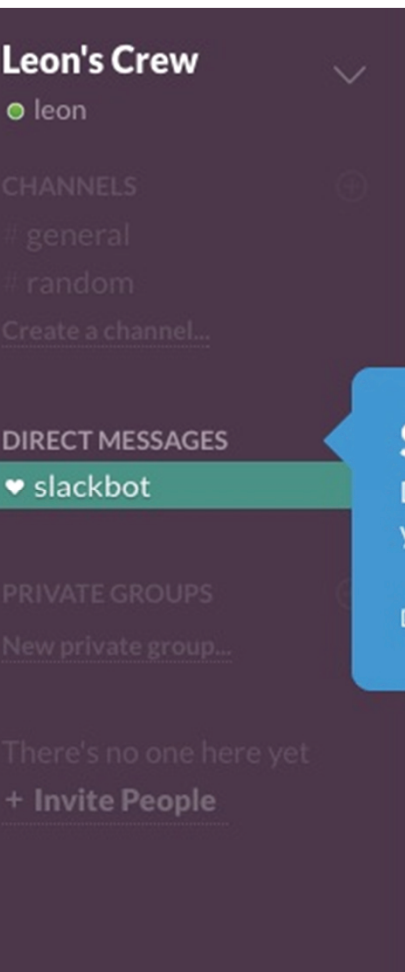
PRO TIP:

STEP-BY-STEP TOURS ARE A BAD IDEA. INSTEAD PROVIDE ONE-OFF MESSAGES BASED ON USER ACTIONS.

STEP 2: DESIGN IT

EXAMPLE:

Slack's onboarding messages



Send direct messages

Direct messages are private, 1-to-1 messages. Once you invite people, you'll be able to chat with them here.

Done? [Click here to skip](#)

Got it!



Slack

STEP 2: DESIGN IT

INDICATE PROGRESS

**USER MUST KNOW HOW
MUCH MORE TO GO**

STEP 2: DESIGN IT

EXAMPLE:

Trackduck's sign up process



Add a URL or an image

Add a URL of your website or upload a design in order to start commenting



Install

If you wish to leave feedback on images and your websites, insert a JavaScript code into your website or install TrackDuck extension into your browser

To start using

Enter a URL address

demo.trackduck.

Enter your website URL or leave a comment on our demo page for trying out Track

STEP 2: DESIGN IT

CONFIRM ACTIONS

USER MUST KNOW IT
WORKED... OR DIDN'T

...AND WHAT TO DO NEXT

STEP 2: DESIGN IT

CELEBRATE MILESTONES

**LET USERS KNOW THEY'VE
SUCCEEDED**

STEP 2: DESIGN IT

EXAMPLE:

Mailchimp's mail campaigns



High fives!

Your campaign is in the
send queue and will go out shortly.

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STEP 3
TEST, MEASURE &
FINETUNE

STEP 3: TEST, MEASURE, FINETUNE

**TEST YOUR SKETCHES AND
WIREFRAMES ON USERS**

**5 USERS IS ENOUGH TO
REVEAL 80% OF PROBLEMS**

STEP 3: TEST, MEASURE, FINETUNE

**CREATE MEASURABLE TEST
CRITERIA TO GUAGE
SUCCESS RATES**

STEP 3: TEST, MEASURE, FINETUNE

**DON'T HELP YOUR USERS
DURING TESTING**

**OBSERVE WHAT THEY DO
OVER WHAT THEY SAY**

STEP 3: TEST, MEASURE, FINETUNE

**LOOK FOR POINTS OF
FRICTION**

**WHERE DO USERS TEND TO
STALL?**

STEP 3: TEST, MEASURE, FINETUNE

ITERATE

**MAKE IMPROVEMENTS AND
TEST AGAIN ON NEW USERS**

STEP 3: TEST, MEASURE, FINETUNE

GET READY TO LAUNCH

STEP 3: TEST, MEASURE, FINETUNE

**TURN SKETCHES INTO
GRAPHIC DESIGN**

STEP 3: TEST, MEASURE, FINETUNE

IMPLEMENT USER ANALYTICS

[Google Analytics](#)

[Mixpanel](#)

[Intercom](#)

[KISSmetrics](#)

STEP 3: TEST, MEASURE, FINETUNE

**TRACK KEY USER EVENTS
ALONG THE CUSTOMER
JOURNEY**

**FROM LANDING PAGE TO
SIGN UP TO ACTIVATION
POINT**

STEP 3: TEST, MEASURE, FINETUNE

SET UP USER CONVERSION FUNNELS

TRACK HOW USERS ARE GOING THROUGH THE FLOW YOU DESIGNED

STEP 3: TEST, MEASURE, FINETUNE

MONITOR YOUR FUNNELS

ADJUST TO IMPROVE



DON'T STOP... ONBOARDING

DON'T STOP... ONBOARDING

**BUILD ON THE INITIAL USER
SUCCESS**

**ONBOARD USERS TO OTHER
FEATURES**

DON'T STOP... ONBOARDING

KEEP TALKING TO USERS

**MONITOR CUSTOMER
SUPPORT QUERIES FOR
MOST COMMON
QUESTIONS**

DON'T STOP... ONBOARDING

**INTRODUCE IN-APP HELP
TO ANSWER THESE
COMMON QUESTIONS**

DON'T STOP... ONBOARDING

**PROVIDE FRIENDLY NUDGES
TO FOSTER USER GROWTH
FROM NEWBIE TO PRO**

DON'T STOP... ONBOARDING

**STAY RELEVANT. PROVIDE
HELP AND EXAMPLES
WHERE NEEDED.**

**MOVE FROM ONE SUCCESS
POINT WITH YOUR
PRODUCT TO THE NEXT
ONE.**

DON'T STOP... ONBOARDING

**AS YOUR PRODUCT GROWS
YOU WILL RELEASE NEW
FEATURES**

**PEOPLE DON'T LIKE
CHANGE**

**ONBOARD USERS TO NEW
FEATURES OR CHANGES IN
THE PRODUCT**

DON'T STOP... ONBOARDING

**REPEAT STEPS 1-3 FOR NEW
FEATURE RELEASES AND/OR
CHANGES TO PRODUCT**

**IT WILL ENSURE ADOPTION
AND SMOOTH TRANSITION**

**NEED HELP WITH USER
ONBOARDING?**

**TALK TO PROS AT
WWW.ONBOARDING.PRO**