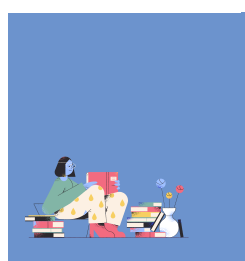




User Onboarding Experience Guide

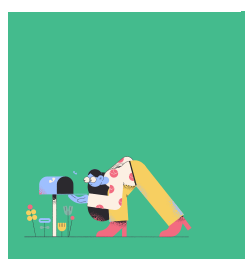
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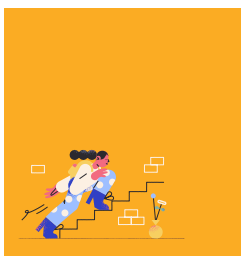
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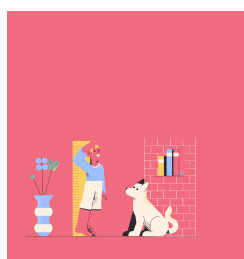
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CHAPTER 1

Goals and Objectives



What is User Onboarding and What is the Goal?

Before we even start defining what user onboarding is and creating a checklist of important goals you need to achieve while onboarding your users, there are two main concepts that really deserve your attention:

1. Onboarding is not about leading users from point A to point B within your product. Onboarding means bringing users from point A (when the user experiences a specific pain point) to point B, showing them how your solution will help them improve their status quo.
2. Onboarding occurs way before users actually get in touch with your solution and very often even before they land on your website. You start onboarding users from the very first touchpoint with your brand.



Onboarding starts with educational content, promotional messages, content curation, and marketing/sales activities and continues way beyond the point at which the user is familiar with your solution.

Onboarding is the first step of the journey that leads to success and advocacy.

Each step of the journey is an opportunity to help your potential customer improve their current situation with know-how and information.

Each element of the journey brings your prospect closer to their aspirational self (the better version of who they currently are) while achieving their goals.

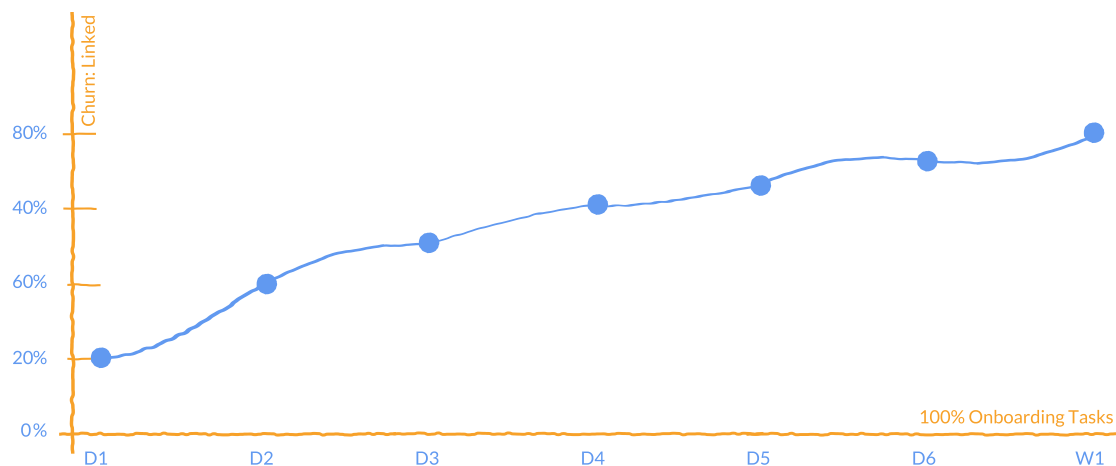
Users don't buy a product, they buy outcomes. Effective onboarding means bringing prospects to

the desired outcomes as quickly and efficiently as possible.

There's a specific measure you might be familiar with which is essential to understanding what onboarding is: time-to-value.

Users need to get to quick-wins as soon as possible to be motivated to continue the discovery journey within your solution. The sooner you prove that your application provides real value, the more engaged and active users will be.

Now that we have a better understanding of what onboarding actually is, let's focus on one specific stage of the onboarding process and find out what should happen when new users try out a software product for the first time.



The importance of D1, D2, W1

When it comes to churn: onboarding is the most critical phase in the customer journey. The longer it takes for users to complete their onboarding tasks, the higher the chance they'll drop off. Leading users to their desired outcome right after sign up is crucial.



Onboarding Trial/New Users

The most critical phase in the entire customer journey is represented by the moment when you onboard trial users.

The actual journey within your product has just begun and so has your relationship with your user. This relationship can result in one of two scenarios: Either they can churn or turn into a loyal customer and a referral lead source.

This phase is mission critical, which is why the first impression counts a lot!

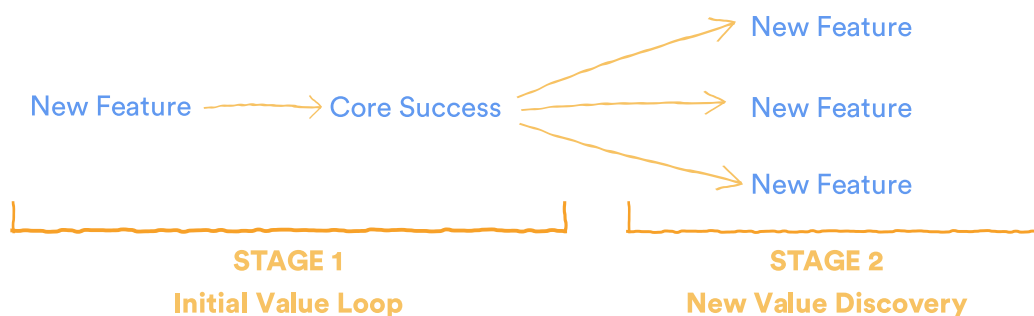
The user experience during the onboarding phase will create permanent associations with your brand and product and set the mood for the entire upcoming customer journey!

Onboarding trial users requires a lot more than simply creating a user-friendly environment that allows them to sign up and start fiddling with your software.

Successful onboarding involves a combination of different stages that lead to accomplishing specific goals.

Here's what needs to happen during the onboarding phase:

- The user can quickly sign up and move on to the actual interface without any delays and unnecessary steps.
- The user needs to fully understand what the product is designed for, what goals they can actually achieve with it, and what benefits the solution presents.
- Users must understand what makes that specific solution unique and why it is worth investing time in testing and exploring it.
- You should take full control over the initial steps that the users take in the software to make sure that your users can immediately set up the environment and achieve some quick-wins.

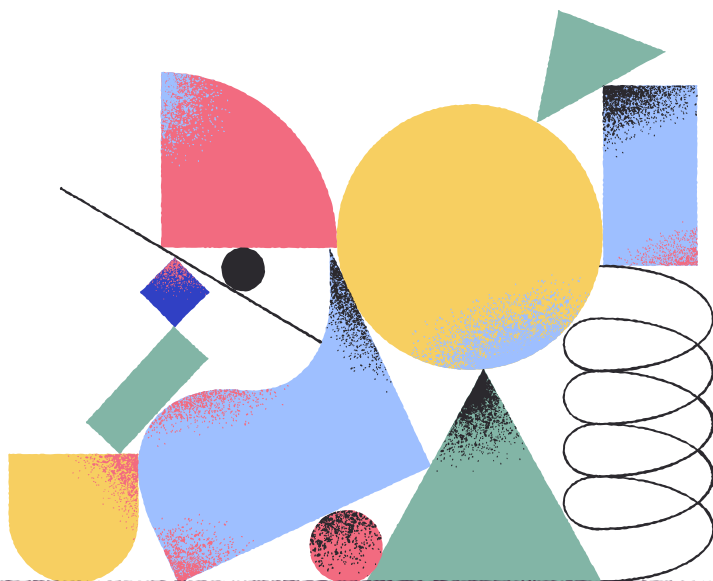


Initial Value Loop

Users are more likely to be willing to explore your solution and try out more advanced features if, after testing some basic features, they achieve their desired outcome.



- Users need to immediately accomplish actual tasks, see results, and understand how the interface works.
- Your users need to follow a specific checklist of tasks and be aware of where they are in the onboarding process (checklist of mandatory critical steps + progress bar).
- You need to address users personally and adapt the onboarding experience according to their needs.
- You need to segment users based on use cases or level of proficiency and adapt the whole UX accordingly.
- Users need to be motivated and rewarded for progress and completion.
- Users must follow a specific set of actions in order to get from A to B in the most efficient way without abandoning the platform/dashboard.
- Users need to be able to decide what to do and immediately find a way to reach their goals.
- Your users need to know what the key features are, how the workflow is structured, and how they can integrate other solutions.
- You need to follow and monitor what happens in your application to be able to intervene and guide users who seem to be insecure by providing contextual information and support
- The whole experience must be smooth, immediate, and pleasant. Delays and frustrations automatically lead to immediate churn.
- You need to show the personality of your brand, its peculiarities, and quirks.
- You need to set a positive mood that will eventually forge the general tone of your future relationship with your customer.
- You have to create the basis for engagement and activation.
- You need to eliminate any confusion and insecurity.
- You must prove that you can actually meet your customer's expectations and over-deliver.
- Eventually, you need to sell your solution as if you were pitching it directly to the user.



This, and actually much more, needs to happen fast. Very fast!

People have a limited attention span. You therefore need to continuously introduce variety and novelty elements to draw the attention of trial users to the next goal.

Think of it as starting in baby steps where you present major features but quickly allow users to reach full proficiency within your product. You need to eliminate any friction and allow users to feel good about their choice, and ideally, you should also be able to turn every step into an event.

Pursuing all these goals dramatically increases the chances of converting trial users into paying customers, and with a great customer success program, you should then be able to generate loyal customers, increase retention, and actually see an immediate increase in return on investment from customer acquisition costs.

User onboarding, as a concept, is gaining popularity. And this is a good thing since a weak or strong onboarding experience can pretty much make or break your SaaS business.

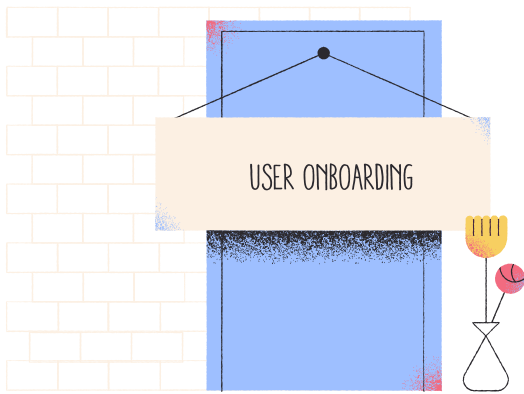
Just to be clear: A solid onboarding process should bring your users from zero to hero in the most efficient and effortless way. During the onboarding process, users should:

- Be able to access your service
- Truly understand what the software can do for them
- Become familiar with the basic elements in the user interface
- Get to know the basic features of your application
- Create a profile and add information required for your software to work
- Feel compelled to continue working with your application
- Create integrations with other services
- Add people to their team (to increase the chance of creating multiple champions for a single account)



40-60%

of users who sign up for a free trial of a SaaS application will use it once and never come back.



The first experience after signup is one of the most vital interaction moments you'll have with your users.

In fact, statistics show that currently 40-60 percent of users who sign up for a free trial of a SaaS application will use it once and never come back.

This makes the first impression of your software the most important component of customer success. This means you need to use the right tone, elements, and explanations to give users everything they need to hit their targets successfully. At the same time, you also need to reduce your customers' friction points by guiding them as smoothly as possible.

YOU have to be in control of WHAT happens and WHEN it happens at every stage.

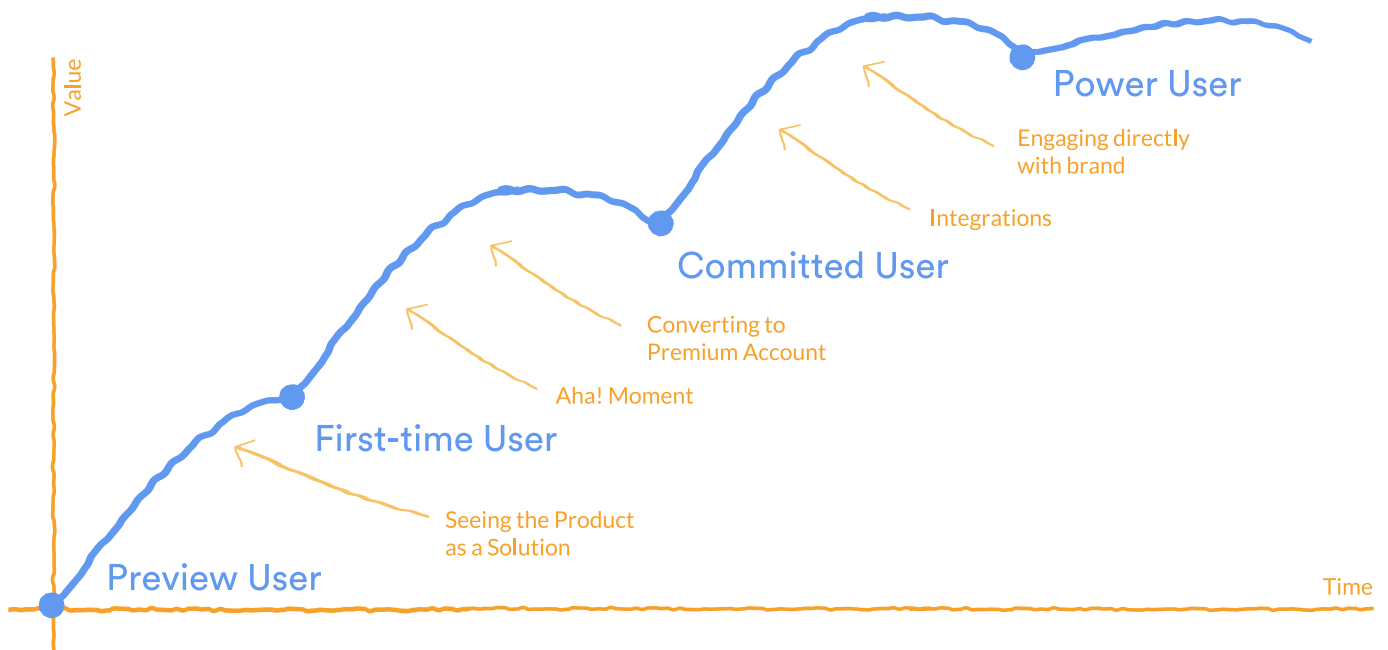
You need to take your users by the hand and guide them through the initial steps that lead to success because you're the one who knows your product and you're the one who can drive adoption by encouraging users to interact with the key features of your application at the right moments.

Retention starts with a successful onboarding strategy. You need to keep customers engaged from the very beginning and make sure that they understand the real value of your product from the very moment they sign up.

Basically, your customer needs to immediately realize what the core value of your application is and understand the main advantages of your solution.



The Most Important Functional Areas of User Onboarding



Different Stages

The discovery journey is different for every customer. The path that leads to mastering your solution and achieving success is seldom linear. There often are many options to choose from and your task is making the journey as linear and organic as possible, quickly transforming every user into a power user.



PRODUCT USE

How do I get users to understand and use my product in the most efficient way?

Note that without a solid understanding of the core functionality of your product, users will only scratch the surface of the actual features of your solution and will never get to see its full potential.

PRODUCT FUNCTION

How can I immediately make it clear to my users what the actual value of my solution is?

Showing what difference your product actually makes in the shortest possible time makes the product indispensable for users.

PRODUCT SUCCESS

How can you make product success easy to achieve and repeatable?

By knowing the customer objectives and enabling them to reach these objectives ... effortlessly.

PRODUCT ENGAGEMENT AND ACTIVATION

How do I create habit forming patterns so that users keep using the product?

Far too many times we notice that users register for a trial, play around for a while, and then never come back to actually implement the product.



Once these main domains are covered, we have a basic framework for user onboarding where many ideas and thoughts should fall into place.

Product managers can then clearly focus on what the optimal customer journey looks like and move on to designing it.

ADOPTION

- ↳ Activation
- ↳ UX
- ↳ Continuous Adoption

**CHECK IN**

- ↳ Set the right tone and expectations
- ↳ Metrics

**ROI**

- ↳ Reports
- ↳ Reminder
- ↳ CX

**CUSTOMER SUCCESS**

- ↳ Renewal
- ↳ Expansion
- ↳ Advocacy

The most salient elements of a successful onboarding experience that lead to activation and engagement include:

- Taking control of the onboarding process
- Steering users through the process and motivating them
- Rewarding users for their achievements on the go
- Providing all the information they need step-by-step within the same ecosystem (avoid leading users to external sources of information. Users need to spend as much time as possible within the product to get hooked.)
- Focusing the attention on one single element at the time while blending out unnecessary components
- Blocking advanced features until users become familiar and successfully interact with basic functions (scaffolding principle that you might be familiar with by looking at games)
- Interacting in real time with users who seem to be stuck and steer them in the right direction
- Showing them the actual value proposition of your solution
- Measuring progression and success
- Continuously training users and surprising them with new elements and functionalities
- Implementing a virtual on-demand assistant that can guide users from A to B in the most efficient way

User Adoption is rooted in Customer Success

The path to customer success starts with in-product engagement and adoption. You need to set the right tone from the very beginning and constantly remind users of the value they're provided with from the very beginning.



You need to guide users through the process to avoid delaying interaction with your application.

Retention starts with a great onboarding experience. Statistics show that the likelihood of churn dramatically decreases when a user accomplishes all their onboarding tasks within 24 to 48 hours after signing up!

The first experience someone has in your application will have short-term and long-term repercussions on retention.

If the first emotions users experience when using your product are frustration and confusion, there's a high chance they won't stick around for long.

The path to a customer's desired outcome needs to be short and direct. Obviously, to fulfill this, you need to have a firm grasp on what your users' desired outcomes are and recognize whatever problems they may face along the way.

Onboarding is making decisions for the users. The easier the customer journey, the better the whole user experience is. Uncertainty leads to fear. Providing too many choices leads to uncertainty. That's why you need to lead the way and facilitate progression one single step at the time.





Help Users Fall in Love with Your Product

Think about a software solution you use. Now go back to the steps that led you to give it a try.

What happened when you first tried the application?

Why did you decide to test it in the first place?

Why did you decide to stick to it?

Sometimes we use a piece of software for the lack of a better solution.

Sometimes we're stuck with it due to lack of funds. You know, other solutions might simply be too expensive, even if more attractive.

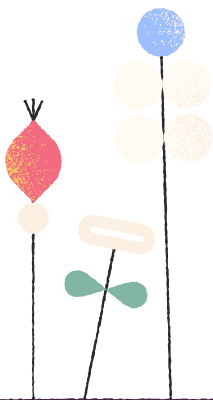
But do you really want your users to settle for your solution?

Or do you want them to actually fall in love with it?

Settling for something or being stuck with it are scenarios that seldom lead to a long-term relationship.

If you want to build a long term relationship with your users, you need to make sure that they actually understand your product ... so much so that if a newer and sexier application enters the market, your users would never think about switching.

But how can you achieve that?



The Secret Recipe for a Long-Term Relationship with Your Customers

Again, everything starts with onboarding. The way you present your product, how easy it is for your users to achieve quick goals, and that famous “aha!” moment that changes everything.

The second step is showing that you care. Be present. Check in with your users. Follow trial users closely. Guide them by the hand. Send them emails, call them, guide them through the crucial period where they must set up the whole environment and achieve their goals.

In a long-term relationship, you take care of your partner and you show them you’re there for them.

Reach out. Make sure things are okay. Surprise your users with additional new elements. Unlock special features. Offer educational content that supports them while they try to solve their problems.

Send them reminders explaining everything they can do with your product. Help them integrate your solution as deeply as possible in their organization and daily routine.

And if things go south... well, it can happen. Who’s perfect?

But be there. Respond as quickly as possible. TRULY listen to your customer’s problem and intervene as promptly as possible.

Show them they can rely on you.

And remember: People are a lot more forgiving when problems occur at a later stage if the initial portion of their journey was positive!

The roadmap to a perfect romance includes:

- a. A smooth CX (customer experience) throughout the entire customer journey/every touchpoint
- b. A great UX and a thorough onboarding process that presents your product in the best light and eliminates frustration and doesn’t delay interaction and engagement
- c. An awesome product roadmap
- d. A great brand
- e. A solid customer success program
- f. Flawless customer support.



Making Your Product Shine While Onboarding New Customers

User onboarding, in a way, is making sure that your users know everything YOU know about your product and the problems your solution is designed to tackle.

Since you should never stop selling your solution, even to existing customers, onboarding is actually an ongoing process that basically never stops and simply turns into a long-term customer success and retention program.

When you onboard your users, you have to make sure that they are aware of:

- The problem you're addressing with your solution
- How you approach the issue
- Why your solution works
- The benefits of your product
- What your brand stands for
- How your product works
- How to achieve short-term goals in the fastest possible way
- How to integrate your product in their long-term strategy
- How to become super proficient when using your platform
- How to integrate your product within a complex ecosystem that includes several other software solutions
- How to measure success

Customers require a lot of information to understand your world, your brand, and finally your product.

But once they get there, the rewards are priceless:

- High Engagement
- Retention
- Customer Success
- Advocacy

Customers who completely understand your company and your product will quickly achieve their own goals and will keep integrating your solution at an increasingly deeper level in their organization.

Such customers will create a special bond with your brand and product that will lead to retention and ultimately advocacy.



The More You Know About Something the More You Appreciate It

Have you ever noticed that, in general, the more you get to know something, the more you like it?

Say you watch a movie you like. Then you do some research and discover a lot of details about plot, photography, actors, filming, symbolism, and several other choices that the filmmakers made when writing or producing the movie...

You go from liking it to loving it and talking about it with all your friends.

The same might happen with a piece of music, a painting, a photograph, a car, a company, a celebrity, a cult design object, a brand of whisky, a building...

That's why documentaries are so intriguing.

Falling in love requires time! We might feel infatuated with a concept, a person, or a product but knowing more about them opens the door to a whole new world that makes us appreciate them a million times more.

And then, we really get to see the essence of what they are and truly get to understand all the different

facets. Fascination replaces interest, which in turn becomes enthusiasm and sometimes even obsession! The more we get into something, the more we're fascinated by it and feel compelled to know even more and continuously talk about it with others.

Onboarding, then, means providing your users with information and tools to quickly understand your brand and your product, integrating it within their company, and making sure they're successful with it.

That's a very tall order. Especially now that we're surrounded by an incredibly large number of brands and products and are required to implement and work with several solutions on a daily basis.

That's why onboarding happens at different stages and involves different departments.

Onboarding your users is a process that can truly make or break your company, and the experience your users will have at different stages of their journey will define the success of your brand.

In the next chapters, we'll talk about all the stages that are involved in a thorough onboarding strategy.



User Onboarding Hacks Specifically Designed to Increase Activation

We've talked extensively about the main steps involved in the user onboarding experience in the previous two chapters of this guide.

Now that we've covered the main goals and achievements of a solid user onboarding process, it's time to create a list of tactics and hacks that will improve the UX and generate happier customers!

The Basic Elements of the Onboarding Experience

There are some very general and very specific elements that are put in place when welcoming new users and ensuring that they have all the information they need to operate efficiently in a software application.

Let's look at what tools most companies offer as an in-product personalized message or something most SaaS businesses send to new users once they sign up for the product.



INSTRUCTIONAL VIDEOS

These should explain the core features of any application. In theory, such a process might delay interaction. Therefore, it's always better to keep such videos outside of the product (before sign-up) or later on by directing users to specific resources via drip campaigns while they become more and more skillful in the application.



GENERIC DRIP CAMPAIGNS

A series of emails to increase engagement, activation, and enhance product understanding.





In order to bring user onboarding to the next level, SaaS companies must understand that this process consists of four components.

These factors will go beyond basic elements and should co-exist with the lifecycle stages mapped out by previous VP Growth at Hubspot, Brian Balfour: Product use, product function, product engagement, and product success.

Once these main domains are covered, you'll have a basic framework for user onboarding.

Product managers can then clearly focus on what the optimal customer journey looks like and move on to actually designing it in steps.



CHAPTER 2

Basic Tips



Six Onboarding Steps that Lead to Higher Conversion, Activation, and Retention

Step 1: Define the User Journey from the Start

Drip campaigns, articles, and videos can bring users closer to your product, brand, and people. Nonetheless, you need to start by driving engagement directly in the product with assisted flows that speed up action and reduce time-to-value.

Guide your users from the moment they signup and suggest a clear journey for them. Don't force them to think – just get them started.

Properly understanding onboarding grants you control, and you decide what happens at each step of the phase.

Product managers need to understand that motivation is the engine of a successful onboarding strategy and that it doesn't depend on the type of user who signs up. Users should be able to pinpoint a specific “why” for using your product.



From the user's perspective, the recurring questions are:

Why am I spending my time in this software?

Why should I continue to invest my time making my way through this product?

If you only offer users the possibility of solitary exploration, you're asking them to come up with their own answers!

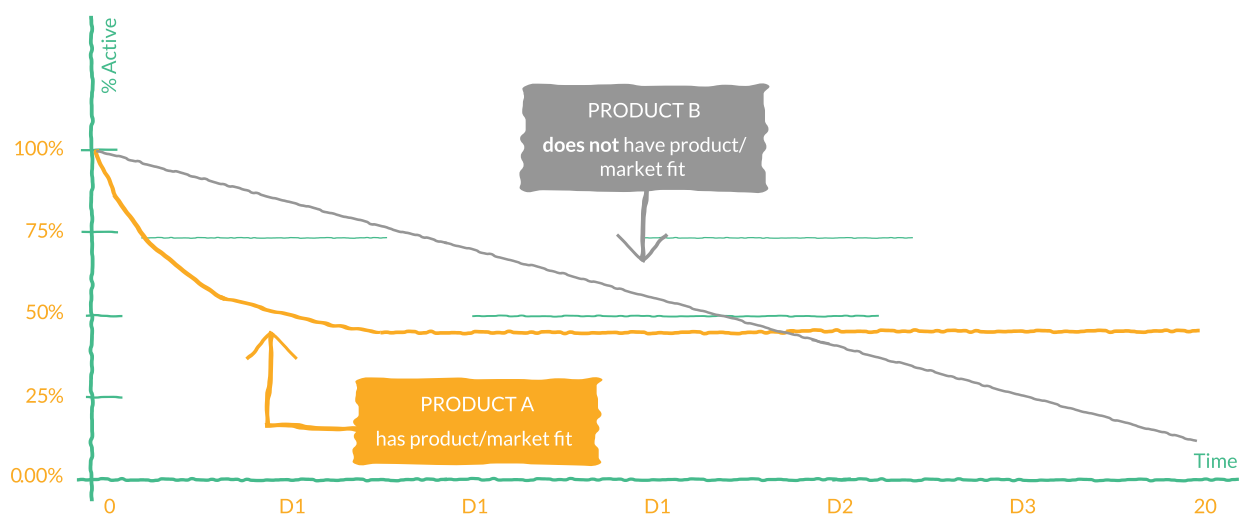
On the other hand, if you present users with the best converting journey at the very beginning, they'll automatically feel motivated to continue.

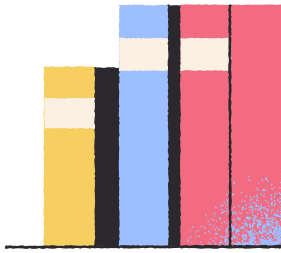
However, even if users are motivated to get started on their own, overthinking is a motivation killer.

Prevent unnecessary thinking or choices. Choices lead to paralysis! Instead, offer guided assistance.

When providing an immediate action plan, you'll notice that only a few people will choose to proceed with their own exploration journey, whereas most of them will go for your suggestions.

This way, when people are overwhelmed with tons of applications and decisions, your unique product stands out because it facilitates action instead of forcing exploration.





Step 2: Measure Objectives and Task Success

Push new users to complete the most important tasks, one after the other, in the shortest possible time.

Also, if you blend out all the elements which aren't relevant to the pertinent task, the user will interact with key features without any distractions. It seems like a simple process, but this can make a huge difference in terms of success.

This leads users to become familiar with the software while working with it (learning by doing), and they'll achieve plenty of micro-goals while directly interacting with your product.

This creates a positive mental picture of the software, making future usage more likely and expectations for future learning more positive.

Step 3: Support Users Before They Tell You They Need You

It's difficult to walk in your users' shoes and determine what generates friction, annoyance, or hinders decisions for them at each stage. However, you can use segmentation to personalize their journey based on profile, behavior, and needs.

The importance of this step is connected to retention. You should proactively assist and customize the user experience for your customers in order to reduce the likelihood of churn.

For instance, you should remind users to complete certain tasks when they seem to have forgotten, and you should prompt them to test key features in your product if they still haven't done so.

The same goes for rewards: Make sure users are properly rewarded when they achieve key milestones in your application.

This approach can also be used to address a customer segment with low engagement rate while these users are still in the product. If you notice that a customer is prone to churn, you should directly address their concerns immediately and proactively intervene to guide them to their desired outcome.

Take the case in which a customer is idle for longer than two minutes after signing up. Or, if your potential customer seems to be stuck while accomplishing a task for longer than a minute. You should quickly intervene and assist them through the next steps.



Step 4: Interactive Guidance to Explain Everything

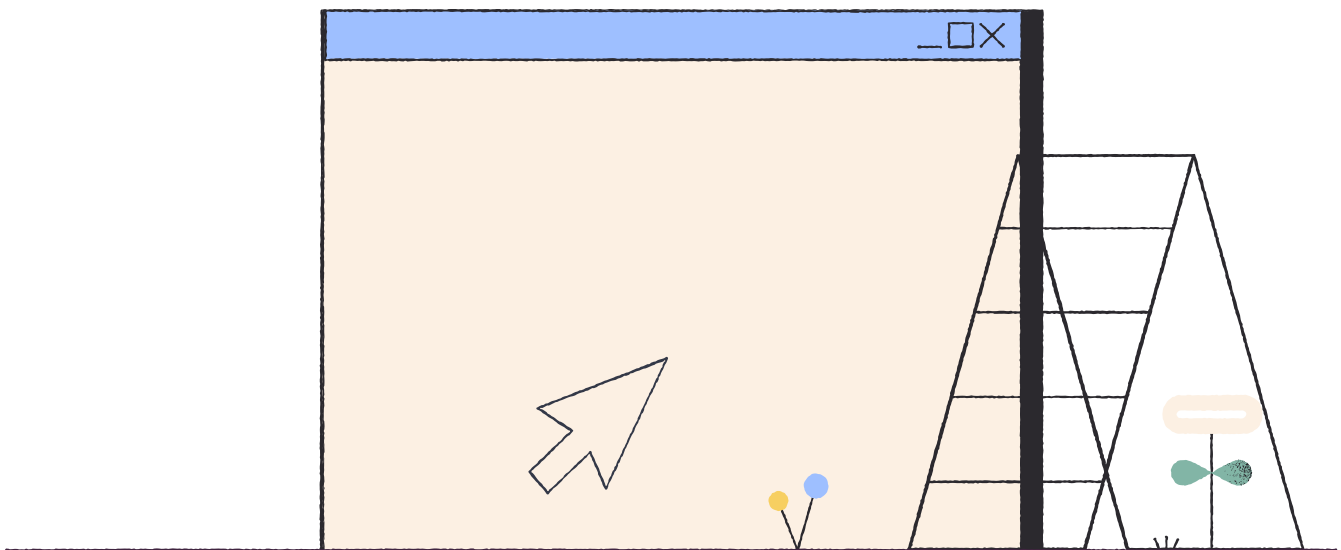
New users to your software are more likely to misunderstand the true objectives of specific functionalities offered in your software application.

Help users understand your software by solving problems interactively throughout the entire life cycle.

Remember, if users need to leave the software to solve a problem, they have the opportunity to never come back and will, therefore, churn.

By keeping customers within the software application, customers learn interactively to become proficient in the original ecosystem and self-sufficient in problem-solving.

A virtual assistant that explains the software and can be requested on demand could be the solution here. Through the use of interactive guides (provided by the virtual assistant), users learn how to properly use the new software in detail without leaving the onboarding process to visit a video tutorial or FAQ page.



Step 5: Set the Right Gradient

First, ask yourself whether you really understand your customer's objectives and why they have chosen your software.

Once you answer this, it's time to set the right gradient: Too high and many users will drop-off.

Create an easy roadmap with product milestones that users should easily flow through.

Don't let users try to attempt the most complicated tasks in the software before completing the critical milestones.

Again, think about games. Difficulty increases with each new level, and users are not able to try to tackle a new challenge without going through the previous levels.

There's a learning curve involved in the process. In a game, you'd never be required to test your skills with the most difficult or fastest challenges at the very beginning. This would lead to frustration and users will feel discouraged about their performance.

Let your users feel good about their achievements!

By strategically guiding users through different levels of complexity, you'll be able to support and encourage each person through their tasks while they interactively acquire the skills to make greater use of the product.

These achievements serve as incentives for product success while customers also get used to the software and its functionalities with increased engagement.

Step 6: Provide Ongoing Training

Exactly as we see with sports, software users will eventually plateau at a given point of proficiency.

It is mission-critical to make sure that users receive ongoing training to break through these plateaus and adopt a higher level of knowledge within the platform.



User Onboarding Hacks Specifically Designed to Increase Activation

Customer activation is one of the most important metrics that determines the fate of many SaaS companies.

While many startups claim product-market fit through high conversion rates and early customer adoption, in reality, these don't function as indicators for the revenue that the business will make in the long run.

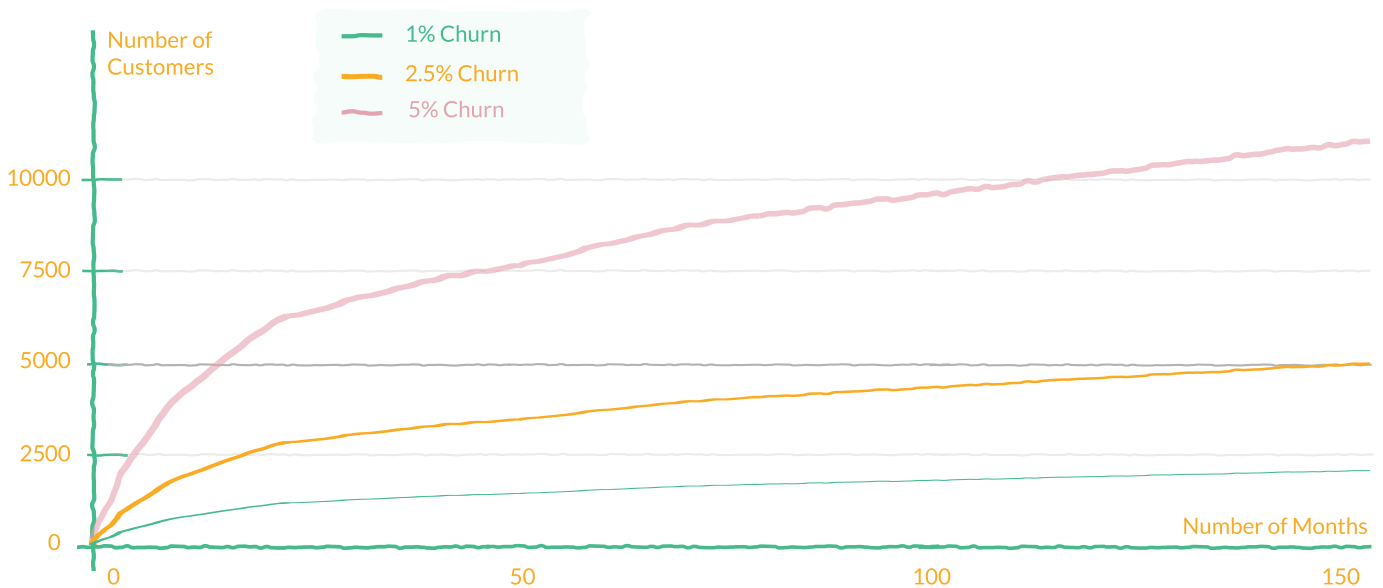
There are two key elements that influence any SaaS company's success in terms of customer acquisition: Activation and retention.

Activation rate is the actual rate at which customers become active users. Retention rate is the actual rate of customers who continue to be your customers over time.

There's a reason why the top 100 SaaS companies have a higher revenue than the next 250 falling behind them, and it's not a matter of luck. The main difference is to be found in churn and how they manage to curb it and keep customers hooked to the product.

Paying close attention to the design issues that hinder activation is immensely helpful when it comes to reducing churn rate. This, together with applying more sophisticated activation tactics, is what allows successful companies to immediately engage new users and retain a large portion of their newly-acquired customers from the moment they sign up.





The impact of churn

Churn is the archenemy of SaaS growth. No acquisition-based model can curb the damage caused by a high churn rate. Just a slight increase 1.5% in churn has a devastating effect on growth rate, and CAC.



Here's a list of a few noteworthy tactics implemented by top SaaS businesses when building out their user experience strategy:

Create Habits

Companies like Facebook provide external triggers to initiate the use of a product or service. This is also known as hook.

As Nir Eyal described in his book 'Hooked,' a hook can be anything from a checklist of task completion to the activation of new features.

Notice how companies like Slack have carefully adapted their user experience around these features? The action is then followed by a reward that the user gets for performing that action and this cycle is repeated.

Habits aren't exactly known for being easy to break, so the closer you can get by building predictable expectations for users, the longer they'll stick around.

The strategy is clearly interconnected with gamification strategies and derives from successful onboarding strategies of game apps.



Add Feedback Loops

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The impact of churn

Feedback mechanisms that trigger action follow a circular logic as each action needs to be followed by achievements that drive motivation which, in turn, triggers new action.



Rewards can be actual benefits, such as unlocked features or discounts. But these rewards can also be purely emotional and range from a simple positive confirmation to status upgrades. Some companies offer access to exclusive communities or information, whereas others congratulate their active users with happy faces, on screen confetti, or positive messages.



Ask for Micro-Commitments

We tend to value things by how ‘easy’ or ‘difficult’ they are. The same holds true for products. Paradoxically, we don’t seem to care too much about things we achieve effortlessly.

There’s a sweet spot between feeling frustrated when trying to achieve something and feeling rewarded for being part of an elite group of people. People tend to take for granted the products or services that are simply thrown at them.

Being required to do work makes people feel like they deserve the product or service, meaning that they care about it a lot more. The sweet spot can be found through micro-commitments.

It may be a good idea to ask users to invest in your product or service to feel as if they actually earned it. For example, you can ask them to provide specific information or perform additional actions in order to be able to sign in or access specific features. Careful, though! The key is finding a balance between smooth UX and gamification.

Key to this element is timing. Asking for too much too soon might have the opposite effect and generate frustration. The micro-commitment can be put on hold until a later stage, such as when setting up profiles or integrations with other apps or services.

Create a Better Onboarding Experience

The onboarding phase is the first opportunity you have to show your users what they need to know. The first experience someone has in an app is the one that sets the precedent for the entire relationship they form with your company. This is where you should take your users by the hand and guide them through each process step by step.

If the first emotion they feel from your product is irritation or confusion, there’s a high chance they won’t stick around. The path to a customer’s desired outcome needs to be clear from the very beginning.

To fulfill this, you need to have a firm grasp on what users’ desired outcomes are and preemptively identify whatever problems they could face along the way.

Properly onboarding a user requires you to make decisions for them. The smoother the customer journey, the better the whole user experience is!



Create Early-On Engagement

Sometimes people sign up for apps and services and then, for whatever reason, the onboarding process is interrupted. These users are not even given the chance to appreciate all the features and benefits of your solution.

Sure, a few of them can be activated via “we miss you” or “you’re not being very active” emails. But the idea is that the sooner a user interacts with your brand, the more involved they’ll be with your free trial or test version.

The important factor here is time. You need your potential customers to dive in straight away and collect the first positive impressions of our product.

Look at Duolingo, for example. They do not put any gates between users and product. You go to the website and start with your first language class. You’re only required to sign up afterwards.

Another classic example is Slack. Unlike Duolingo, they require you to sign up from the very beginning and confirm your mail - a step directly connected to the core functionality of the product.

After confirming your mail, you’re immediately praised (remember when we talked about small rewards?) and guided through the process of creating a team. They even suggest your team’s domain based on your email address!

But, the critical part of Slack’s onboarding process is the slackbot. Not only does this bot introduce and explain the product, but it also sets up your profile.

The experience is flawless and the very first point of contact with the actual product is funny, intelligent, and well-designed. Boom! By chatting with the bot we are already using the product!

Creating Checklists

Letting customers guess what they need to do next is not the ideal choice if you want to get them to engage with your product. A progress bar can be useful to try and motivate users, but this element is not enough.

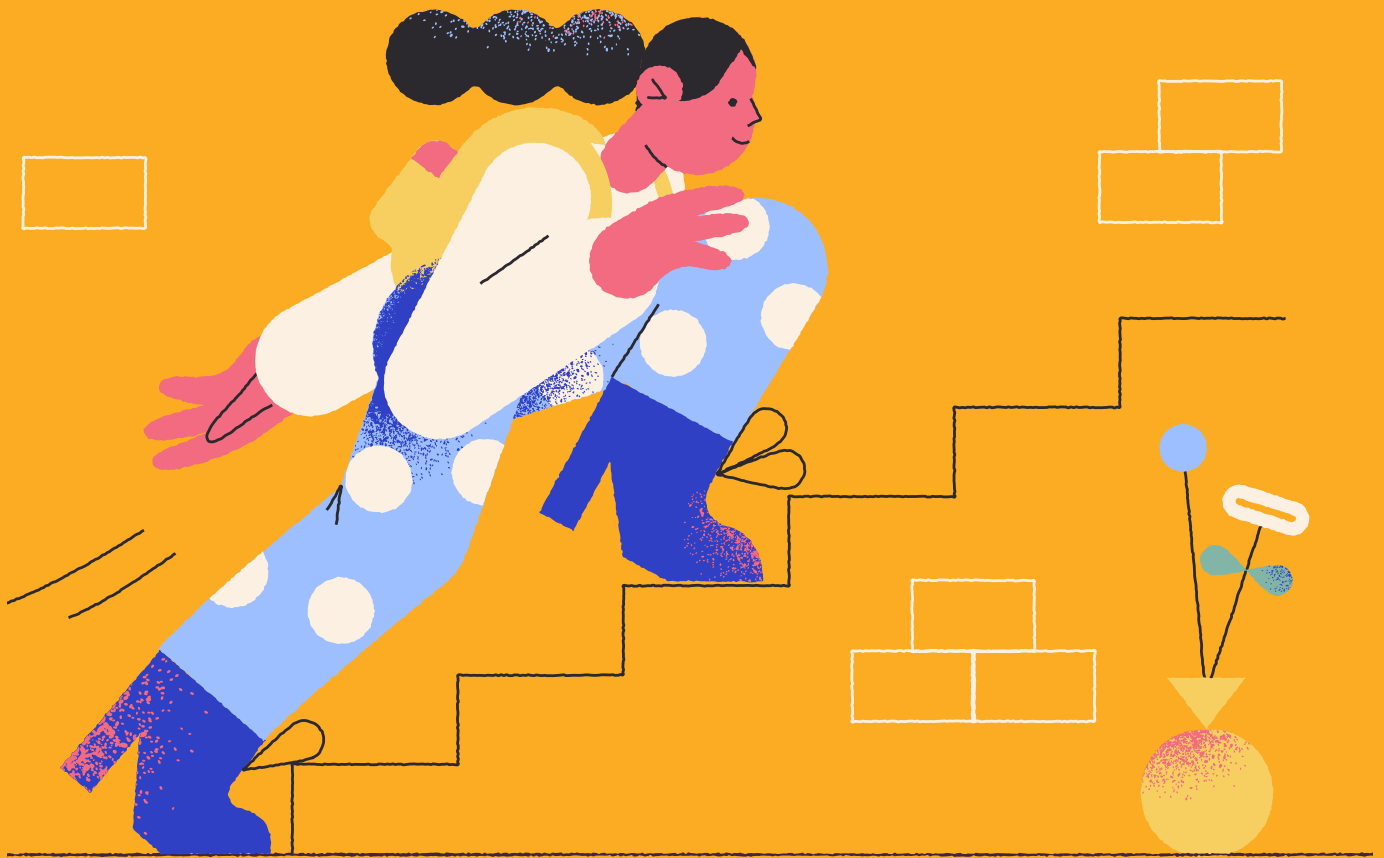
LinkedIn, for example, prompts you to add sections to your profile and shows you how advanced your presentation is. However, you can simply ignore this suggestion window and perform other tasks. By providing similar windows, LinkedIn leads the user to activation, but it is still easy for the user to procrastinate or avoid the process altogether.

An efficient checklist that eliminates distraction can be achieved by embedding checklists directly in the application itself or by using a virtual assistant that guides users during the onboarding process.



CHAPTER 3

Advanced Tactics



Advanced Hacks That Lead to Conversion, Engagement, and Retention

We're used to associating engagement and activation with badges, mails, and notifications.

But user activation is a very broad subject that involves so much more than gamification and UX design. User activation and retention are deeply connected to human interaction and emotions.

It all starts with active communication. A user who is passively exposed to a new software solution without guidance or any other form of interaction will hardly feel any connection to the brand and is unlikely to show appreciation.

How to Address Your Users to Spark Activation

The first thing you need to do is collect information. The more you know about your users, the easier it is to approach them in the right way.

The next step is to split your users according to specific target group and customer persona. You also need to create segmentation on the basis of their stage in the customer journey.

At different stages you can use different tools and social proof elements such as onscreen messages,

Companies need to communicate with their users individually and send clear signals that can elicit a dialogue.

Users need to be addressed directly and approached with clear signals.

It's like being at a party. Say you want to start a conversation with a person you find attractive. The first thing you can do is signal the fact that you'd be willing to start a dialogue and get to know the other person better. That's active communication.

push notifications, content, emails, or any other kind of value-adding services.

With new users, activation begins at the very moment when they start to interact with your software.

You can't address such users with exit intent popups! You need to start a proactive dialogue way before they signal their will to abandon the ship. At this moment, it's already too late to try and start a conversation.



Exploratory Phase and Micro-Aggression

Studies that we conducted at Userlane showed the effects of instances of micro-aggression during the onboarding phase.

When signing up to your service, users have a very clear and specific goal in mind. The longer it takes for them to reach their goal, the more subconscious negative feelings they accumulate.

We, as users, don't consciously perceive this, but these moments of micro-aggression accumulate at a very fast pace (we're talking about milliseconds here).

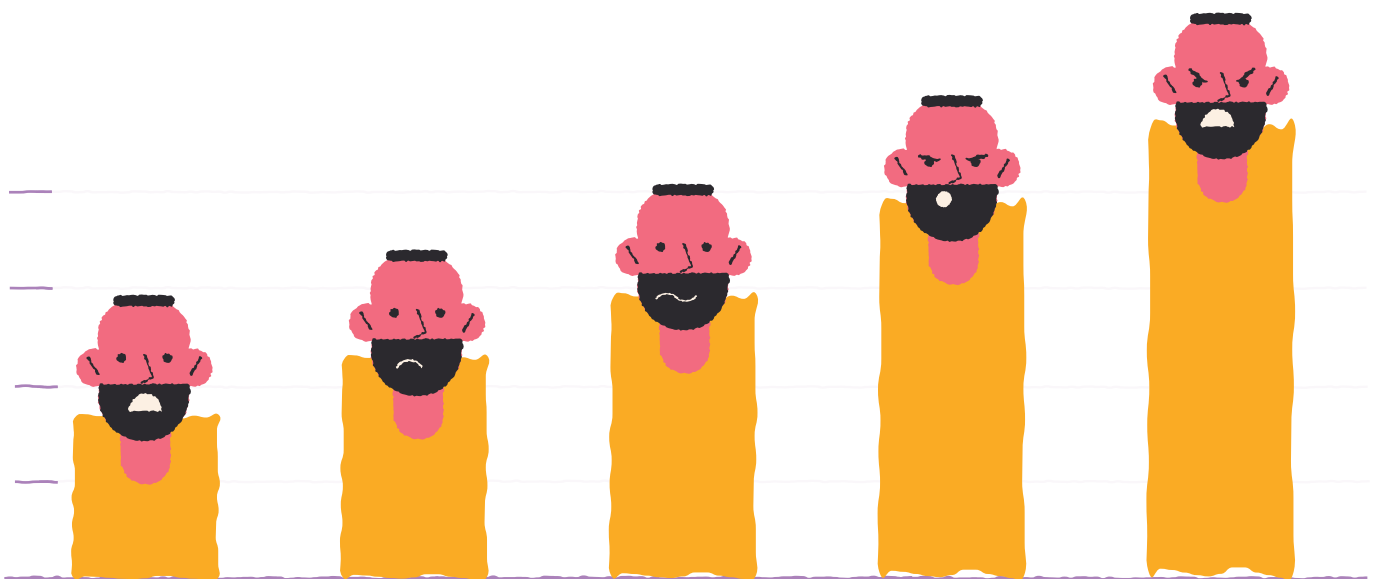
And even if each instance seems innocuous, these feelings pile up and can have a devastating effect.

Each imperceptible micro-frustration brings us a step further away from the brand we're interacting with, and eventually we will feel compelled to abandon the service.

Boosting user engagement and activation means eliminating stress and instances of micro-aggression.

Instances of Micro-Aggression

Frustration subconsciously grows over time. Single incidents might not lead to churn but the sum of all minor issues can cause the user to snap.



A Dialogue with the Customers

A dialogue is a two-way street.

This is the time where you need to collect data and find out what the user signed up for and what their expectations are.

It's essential to check all the indicators you collected along the customer journey, such as where they come from, landing page, signup process, articles they were interested in, emails that triggered action etc. You ought to find out what features they're actually interested in.

Otherwise it's like asking just half of a question.

For example, imagine you contact a food delivery service. By doing so, you obviously signal that you're hungry. But when you talk to them they keep you one hour online presenting the entire menu and different cuisines they offer from Indian, to Mexican, Italian, French... they spend time listing all the options only to find out that you actually wanted to order Sushi.

Your product might include plenty of features, but you can't bombard your users with copy and messages and present the whole palette in one go.

Different users will interact with your software at different levels of proficiency, and most of them end up choosing your service because of one single, specific characteristics.



Onboard Users in the Right Way

We all have a very limited attention span and when being presented with a new solution, we need continuous inputs that bring us back to focusing on new elements and actions.

If users don't find what they're looking for they'll leave.

Of course, in the spirit of segmentation, you also have to let them choose.

Ask them if they want to be guided with an onboarding tour or be free to explore. Let them decide. It's all about giving options and empowering your users.

Popups that contain a friendly face might look like a silver bullet to boost user engagement. But it's not

that easy! This approach is not effective for all users.

Let's go back to our party: You obviously need to send signals to a potential partner, but you also have to send the right signals.

You want to inspire positive reactions that resonate with each specific user based on their set of beliefs and expectations.

When trying to approach somebody, you can be a lot more effective if you gather some information about what drink they like, what kind of sense of humor they have etc. so that you can plan your approach accordingly.

It's easier to engage and activate users when you have specific data.

The First Impression Counts

A signup is not a guarantee of success. It barely shows interest.

You still need to continuously sell your service to your new users.

Even after people invest money in your solution, they need some kind of confirmation and want to be reminded that they made the right choice.

Customer care, customer success, and after sales activities reinforce the bond between the brand and their clients - a brand that truly cares, continues to support their customers, and helps them achieve their goals.

Newly acquired users, in particular, need to experience the value of your solution first-hand.

You need to grab their attention and show the real benefits of your solution, and that's only possible if you know what the user is interested in.

Skipping this opportunity and thinking that the effort of setting up such a specific onboarding experience is not worth it probably means that you haven't grasped the true functionality of the SaaS business model.

Going back to our party analogy, simply relying on a good design and a good product is like standing in a corner and waiting for others to approach you. Somebody might think you're interesting but may expect you to break the ice. And soon, they'll be tired of waiting and find somebody else they're interested in.



Interacting with Human Beings

Similar analogies work well because user onboarding is similar to human-to-human interaction.

Words like ‘users’ (customers, consumers...) are deceiving and quite demeaning. Users simply interact with a product and consumers consume to produce revenue. In reality, there’s no B2C or B2B. When presenting your product, you’re dealing with humans and their emotions.

Therefore, you need to stimulate, entertain, serve their purpose, and provoke emotions.

User activation means habit formation. And people feel compelled to come back and use your service again and again because they love interacting with it.

Activation is strictly connected to positive emotions.

A well-designed and put-together newsfeed in a social media application, for example, stimulates the production of endorphins, which in turn elicits satisfaction, thus leading people to go back to it multiple times a day. It’s a habit.

Slack forces you to check your channels by leveraging an atavistic need for communication. If you don’t go back to it and check all the different conversations you feel left out.

Your brain is wired to seek rewarding experiences. And it decides on what it considers rewarding in milliseconds. It’s all about gut feelings. Our reflexes and our instincts work faster than thoughts and rational thinking.

When somebody pitches a baseball at you, your brain doesn’t need to explicitly perform complex operations and calculations to predict velocity and trajectory. Experience and practice create the basis for our reflexes, and despite not knowing how fast the ball is traveling, we still manage to catch it.

This is the same thin slicing mechanism that instinctively creates a first impression of people or situations, helps us define what is rewarding, and warns us when a situation doesn’t seem trustworthy.

Activation is strictly connected to positive emotions.



Dealing with Habits

Our life is characterized by habits. We're essentially programmed to be lazy and avoid improvisation.

Our brain tries to automate everything and habits become good proxies for our decisions.

We do things at specific times of the day and continuously follow rituals.

A company can add value by becoming a habit that doesn't interrupt or delay other activities but rather streamlines them.

Social media platforms manage to fill little gaps in our everyday lives, such as when we're at the bus stop or when we stand in line waiting for our coffee.

These little empty moments never used to be perceived as rewarding, but mobile technology and social media now add a perceived value to these moments.

For example, some companies have location services connected to their application to remind people to check if they took their keys before leaving their home.

Careful, though. Flashing lights, red dots, and numbers can also have a negative effect if they simply lead to compulsive behavior.

People often feel compelled to check their FB messenger as soon as they're notified of an incoming message. These are what we call dark design patterns that take advantage of programming errors in our brain and lead us to pursuing actions that aren't connected to any actual benefit.

Examples of Good Feedback Loops

A careful habit formation design positively impacts your users' lives and leaves them with an actual choice.

People are naturally attracted by novelty but leveraging their curiosity can be negative.

A good example of positive habit reinforcement we can mention involves Zapier.

Zapier sends you weekly reports of what they have automated for you. The intrinsic value of their solution is helping you save time.

They are constantly reminding you of their value and also inspire you to go back to the application by pinpointing things that could be adjusted and improved so that you can save even more time.

Webflow shows you what new features they've added every time you log in. It's nice and rewarding. You see that they care about their product and their customers.

Slack has a similar feature with a weekly animation that draws your attention to new features.

Activation is connected to exploring new ways to create a positive experience for your customers.

Going back once again to our party, as soon as you manage to talk to a person, you need to convince them to give you their telephone number and go out for a date and then maybe meet for a second date and so on.

It's a constant effort to create a positive impression.



Show Your True Personality

People can't communicate directly with a machine or a user interface. But contrary to a widely diffused business etiquette, it's time for companies to get out there and show some real interaction and emotions!

UIs may look sexy and well-organized, but they seldom present any human touch.

Even the copy you find in most websites is far from being human.

You read a lot of very formal, proper, cautious, and accurate descriptions.

That's because most businesses are afraid of showing their opinions and don't take a stand because they don't want to offend anybody in their target group.

But if you know your customer persona and personally share their experiences in order to design for them, you will gain valuable insight into what they want and expect. This will show them that you understand what they need.

If you don't show any emotions you won't be able to get people to interact with you. Humans only see the

functional aspects of your solution and then move away as soon as they discover a new toy to play with.

Showing your true colors is also important for retention. You can force a match between your product and a customer, but if you are not actually solving their problem they'll churn.

Companies need to be authentic in the way they a) present themselves and their product and b) interact with potential customers who can actually benefit from their solution.

Know your audience! You need to stimulate human reactions. You can't please everybody otherwise you're not targeting anybody. Your firm needs to have a personality.

Companies like Mailchimp or Slack are not afraid of showing their playful side. Of course, this resonates perfectly with their target group (startups and SMBs). Your company might want to show a very different side, but the important thing here is just honesty! You need to deliver on your promises and provide a useful service that leads to gratification and a positive outcome for your customers.





Moving on Little by Little

A relationship is built in steps. You need to nourish and foster each relationship with an increasing level of commitment.

There's a well-known study in which a group of people were asked to put a sticker on their windows to support a cause. A week later, they were asked to show a bigger sticker. And a week later they were invited to put up a sign in their front yard.

And while the majority of these people agreed to put the sign on their lawn, almost nobody agreed to do so in a control group who were never asked to put the stickers on their windows in the first place.

Activation derives from micro-agreements and micro-commitments. Users proceed in steps along the customer journey. Asking for too much too soon

is like throwing a pebble in a lake with a very steep angle. The pebble will simply bounce on the surface of the lake.

Similarly, if the commitment curve is too steep, users will bounce off your service.

Users need to understand the value of your solution by following the right onboarding steps, and they need to explore your product extensively by using a specific checklist so that they can understand its value proposition. Without understanding the value of your solution, your users will churn immediately.

People intuitively perceive greed, and they'll know if you're actively trying to support them along their own journey or if you're just trying to monetize your service as quickly as possible.

Time, Commitments, and Activation

Activation is also proportional to the time you invest in exploring a solution. The more you know about a product, the more you will relate to it - and this will ultimately drive you to implementing it within your own ecosystem.

Enterprises, for example, tend to work in very long cycles due to their hierarchical structure and regulations. And because of these long cycles, they invest a lot of time in trying to understand a product and explore all the benefits a solution presents.

Therefore, their lifetime value tends to increase as they invest time and energy in researching, internally promoting, and implementing a specific solution. They analyze KPIs and the impact of your product over a much longer period of time.

Customers who quickly explore your software in an unstructured way or swiftly and superficially experiment with your free or trial version will not feel any need for commitment.

By guiding users through your software and embarking on the journey together with them, you start fostering a relationship that is based on knowledge and micro-commitments.

Customers shouldn't churn simply because they didn't get the chance to know and understand the value of your software in the first place!

Typically, interaction with your customers will be different at different stages, and your interaction will also depend on who your customer is. For example, some companies directly address users who gave them a very positive rating or review to start a conversation and understand what triggered their enthusiasm.

By involving these users in the company and product development, they create a solid bond that reinforces their initial positive experience.

You can never stop investing in a relationship or take it for granted. You need to make adjustments and maintain a positive mood throughout the entire journey.

The same holds true for customers who have already churned. They need to be given the chance to express their objections, and you need to interact with them and sustain a positive relationship overall despite the fact that they are no longer going to be customers.



A Territory Far Beyond Simple Retention

Convincing users to invest in your solution by use of gamification and rewards linked to progress and completion are classic tools that many SaaS companies use to trigger engagement and activation.

But if your product and your onboarding process lack interaction, it's very hard for users to feel connected to your brand.

Product design and UX design contribute greatly to activation. If we look at Slack again as an example, their attention to detail is what separates them from other services that address the very same pain point in a very similar way.

Persistence is another very important aspect. We all know that the selling process starts with the first 'no'. But this is also a valid point for activation.

You need to go back to your users and add something to the conversation you started with them and you should always lead them to see a higher level in terms of value.

You can't just stop interacting with them the moment you see no reaction. It might just be a problem with timing, or maybe the information you're providing is not exactly what they were looking for.

You just need to communicate different offers to boost activation at the right time.

This continuous feedback loop leads to retention. With this feedback loop, people will remember you and will keep you in mind, meaning they'll have a reason to come back to their trial as soon as possible to see what your product can actually do for them.



A Special Elite

Another trick for activation is creating a sense of belonging. People love to be part of a group. Especially in the case of an elite group.

If you can convey this sense of community through branding, merchandising, exclusive content, private channels, or groups, people will feel part of a bigger entity and will try to come back to your service to maintain their status.

This works for products or services that use miles, loyalty cards, or special status cards for their customers. The same principle can be applied to SaaS businesses that allow people to access a community. They'll be happy to come back to the product knowing that each interaction will bring them closer to and involve them more in the group.

You can, for example, bring product owners together who face the same challenges and offer some sort of community support that adds value and helps them move closer to their goals.



Immediate Engagement and Attention

Early engagement also has a tremendous impact on activation and retention. That's why the most important part of the relationship with your customers starts with a data-driven, customized, and interactive user onboarding.

Ask as many questions as you can when onboarding new users because this will allow you to create the perfect customer experience tailored to their expectations.

The key is keeping their attention.

Some food for thought. Why are there more car accidents in North America than in Germany even though Autobahns have no speed limit?

Again, it's about interaction and being involved in the moment. If you drive 70 mph on a straight interstate for an hour, you'll soon start thinking about other things as you aren't completely focused on what you're doing.

On a German Autobahn, you have curves and narrow lanes, and even if you drive 110 mph, you see cars in the rear-view mirror approaching you at 150. You're totally concentrated on the road and each interaction with the traffic draws your attention back to the driving experience.

Interacting with users, who are trying out your solution for the first time, works the same way.

You consistently engage with them and highlight new activities so that you keep their full attention throughout the whole process.



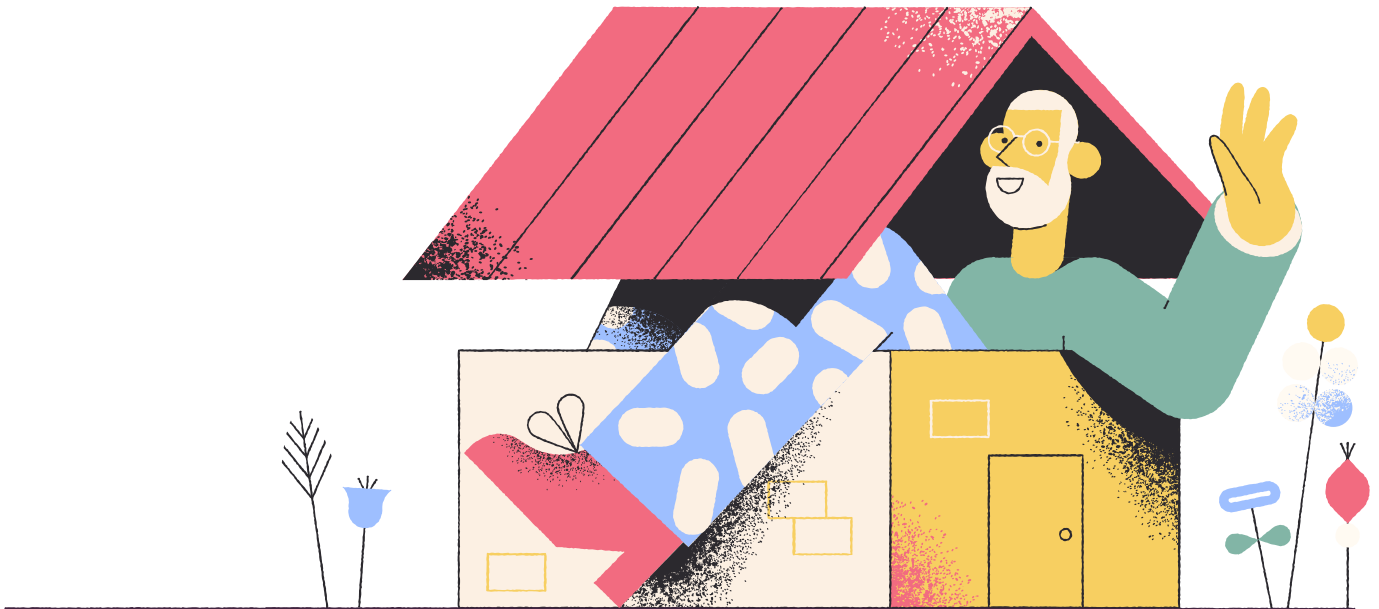
Wrapping-Up

In general, small details play a major role. Creating a habit is quite easy for communication on social media platforms, but unfortunately, the same can't be said for business software providers.

That's why the human element plays such a vital role because the intrinsic mechanisms of the product are not directly connected to rewards. You need to make things happen. You need to help your customers form habits.

People are very responsive to honest compliments and rewards as small as a virtual pat on the shoulder to congratulate them on progress or achievements.

The real secret is taking the initiative to communicate and interact with your users as soon as possible.



How to Create a Great User Onboarding Experience That Leads to Product Adoption and Customer Success

When you think of the reasons why churn happens, what immediately comes to mind? Perhaps product problems, loss of a key user in the account, a bad use case...

Sure, these are some reasons why customers may churn, but the reality is that your churn rate is deeply connected to the quality of onboarding journey your users go through.

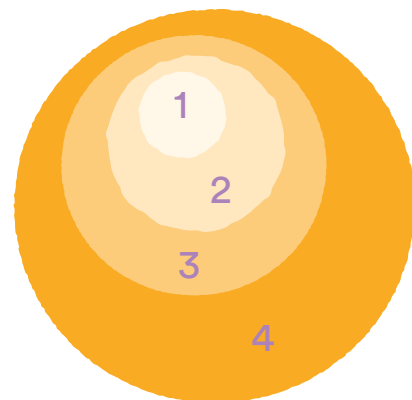
And I'm not only talking about low trial-to-paid conversion rate that occurs when new users abandon your platform before turning into customers. I'm talking about long-term churn.

Does this sound surprising to you?

Bear with me for a second while we go through the user adoption journey and you'll see how customer success is tightly linked to the user onboarding experience and proactive support you offer.

PRODUCT ADOPTION

Feature adoption and user adoption lead to company adoption. That's why feature, user, and company adoption are subsets of product adoption in general.



CUSTOMER

- 1. Feature Adoption
- 2. User Adoption

ACCOUNT

- 3. Company Adoption

MARKET

- 4. Product Adoption



The Beginning of the Journey

The second most important element of user and product adoption is value.

The subscription-based business model is rooted in the value your solution offers.

One of the main differences between the old and the new economy is the fact that companies are required to design for value, not for profit or efficiency.

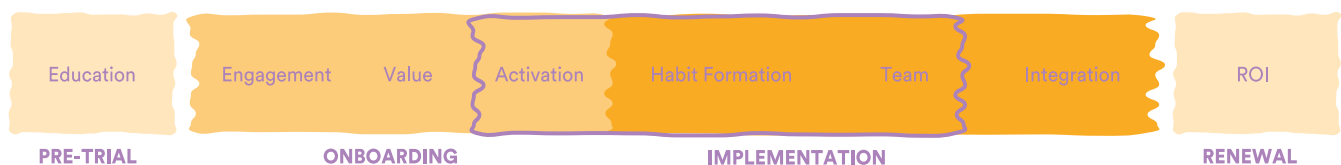
The market for online applications is open and relatively easy to enter. Customers are very well informed about who the players are and what they can offer.

Successful applications can easily prove the value they provide (from the onboarding phase on), keep reminding users of what they've achieved and how their situation has improved while accessing a particular service, and lead customers to success by effectively impacting metrics and KPIs.

Value leads to success and, in turn, to advocacy. The key characteristic of successful companies is the fact that after reaching an ARR of approximately \$1m to 1.5m, they witness logo growth without additional acquisition costs or activities.

The success of your customers is the main driver of growth. Companies that focus their growth on customer acquisition will have a hard time balancing out their CAC over time and will ultimately fail.

Proving value is linked to success. Success is linked to renewals, upselling opportunities, account expansion, and advocacy. These four channels MUST outperform other sources of MRR. And this only happens if customers see (and most importantly understand) the value they've been given. They have to realize that your solution is making a true impact on their operations.



THE ADOPTION JOURNEY

The adoption journey starts way before signup. Your educational and promotional content will need to set the mood to support adoption and retention.



Outstanding brands create connections between customer needs and their solution.

Do you need to improve team communication? Check Slack. Do you want to share large files with external parties? Dropbox. Helpdesk? Freshdesk. Online meetings? Zoom...

The examples are plenty. And in some cases, the same question might spawn two or three different answers. Nevertheless, the consideration pool for specific solutions is usually quite limited.

When it comes to B2B solutions, answers may vary

depending on the audience (for example their growth stage, market they tackle, company size...), but the answers always point to two or three specific providers.

User adoption and activation start with making sure your solution is the first one that pops to mind when your users need to perform a specific task.

This is the very initial stage in the onboarding journey that happens outside of your premises before prospects even engage with your assets (such as content, ads, website).

Provide Value

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Feature Adoption

Another main trigger of user adoption is feature adoption.

I'm creating this article in Google Docs. And I can imagine many of you also work with Google applications instead of using the most popular Office package.

Why is that?

Both solutions are cloud-based. Both solutions cost pretty much the same (if you only consider price per user for apps). Using Google apps is not perceived 'startup-y' anymore. Many large organizations work with Google instead of Microsoft too.

In my case, I'm fully aware that Microsoft Word has tons of useful features that Docs maybe doesn't have. But I personally don't know exactly which ones, and I don't know how they could actually positively impact my workflow.

I'm sure that if I had a Microsoft Word expert next to me, they'd be able to wow me with some unique tricks. And maybe I'd get to the point of thinking, "How did I even work before knowing about this feature?!"

Right now, though, I don't feel any urge to explore other solutions to find features I'm not even aware of.

And that's the key.

YOU have to make users aware of a particular process that will improve their workflow.

Before using Calendly (with existing contacts) or Drift (with prospects), it was perfectly normal for me to send out emails with four to five options to schedule a phone call. I didn't think things could be different. But now, I would never want to go back to that "primitive" stage anymore!

User adoption happens when users see the true potential of your solution and perceive its value. And this process is triggered by leading customers to adopting key features in your application or platform that differentiate your service from existing alternative processes or your direct competitors.

Another example? I love Google flights because you can see charts that allow you to pick the best option when you're flexible with your dates. They don't just offer you the opportunity to shift your travel dates by two or three days. You have the full overview of the entire year.

If I hadn't known about that I wouldn't have seen any advantage in using flights versus other platforms.



Habit Formation

User adoption occurs when you foster user activation and engagement.

Proving value once is not enough. Users must feel compelled to access your application over time.

This is linked to a) the kind of solution you offer, b) your product roadmap, c) your customer success program, and d) your user experience.

Some applications are highly engaging and users access them on a daily basis for a long period of time (their customer lifetime cycle). Such apps create addiction.

Think of Instagram or Spotify, your email account, Slack, or Process Street...

Other applications are very useful but not strictly engaging. Think of utilities such as Google Analytics or your CRM solution.

Applications in this category can be more or less “disposable” based on how often you need to access them. Services that provide constant insights, tips, and solutions for optimization generate a routine that leads to high usage.

Even though, honestly speaking, my Autopilot or Leadboxer accounts are not nearly as exciting as the front page of Reddit, I access my account on a daily basis (sometimes even more than once) to read insights, monitor activity, come up with ideas...

Applications with low utility are more disposable. But this doesn't mean that they're useless!

I couldn't live without DocuSign or Short CM. But I only access such services when required.

For some applications, it's hard to impact the daily routine of their users.

Your roadmap can partially influence that. Two important components in gamification are surprise and delight.

Constant upgrades and new exciting features promote engagement and create a routine (provided that you have a great feature announcement process in place that leads to adoption).

If you show your users that you care and shape your roadmap around their needs and requests, they'll be more likely to engage with your solution more often.

Your customer success program is key in this case too. 'It's up to you to suggest new experiments, try out different solutions, and implement your application at an even deeper level.

Engagement derives from know-how. Your educational content, your in-app support, and your check-ins should provide triggers that lead to activation.

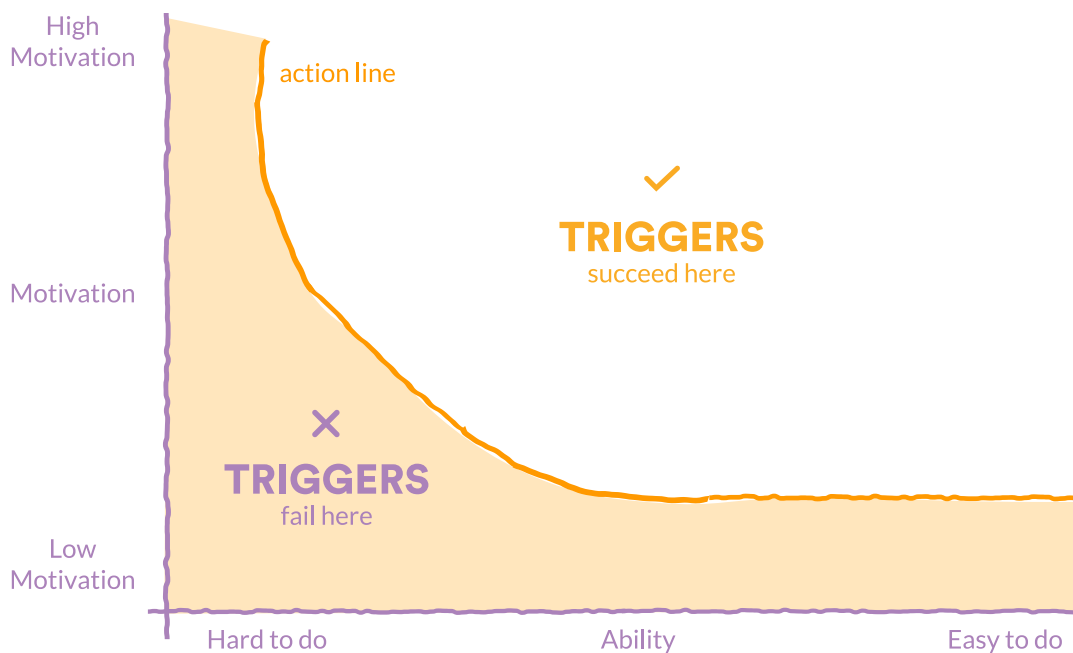


Action derives from:

1. Motivation
2. Capability
3. A specific trigger

FOGG BEHAVIOR MODEL

Action occurs in the upper right side of the chart. Falling below the curve means that action requires too much effort and the event is unlikely.



Your in-app experience, together with your mail or phone communication, should provide these three elements and lead users to try out different ideas without uncertainty.

Your in-product user experience will determine the likelihood of users wanting to explore and engage with your solution.

Intelligent applications provide additional value

with insights. Autopilot recently introduced journey insights, which allow you to spot problematic areas in your nurturing funnels without being forced to access and assess data and reports.

Solutions like Autopilot, Leadboxer, or Oribi force you to go back to your dashboard thanks to mail communication, intelligent insights that actually lead to action, and the introduction of new features that improve your customer journey.



The Role of Onboarding

Finally, let's see the role of your in-app onboarding experience on user adoption and success.

Exactly as your promotional material might be the first point of contact with your brand, your onboarding process is the first point of contact with your product.

Think of it as a job interview, an America's Got Talent audition, or first date.

It takes effort to convince a company to invest time in you and invite you to a job interview (or to get invited to the live show at AGT). And it's hard to convince someone to go out on a date with you.

At the same time, it's really hard for marketing to get users to your product and convince them to try it out.

It's a crowded market out there. It's hard to cut through the noise, catch the attention of your prospects, and lead them to action. Every trial user is a huge (and often expensive) success!

Now that users are in your product, it's your time to shine, prove value, show how you can make their lives better, push exploration and feature adoption, lead users to quick wins, provide all the information they need to understand your product and integrate it in their business infrastructure, and set the stage for engagement, activation, and adoption.

And you only have a few minutes.

Again, go back to the example with a job interview or first date. Everything you do in the first minutes can negatively impact the perception of the person who's ultimately judging you.

And it's tremendously hard to recover from a bad first impression. Think of a candidate who immediately seems confrontational and defensive or a date who makes loud noises when they eat and just keeps talking about themselves. When we get in touch with someone or something for the first time, our senses are heightened and we tend to notice every little misfit. We immediately become extremely sensitive to minor issues.

In psychology, this phenomenon is called 'thin slicing'. We make sense of the world around us through quick judgment because this process has helped us survive since the very beginning of the human race when separating enemies from foes or food from poison was vital.

Some psychologists underline the fact that it might take up to seven positive traits to compensate for a bad first impression.

Imagine starting your job interview already with a minus seven on the trust scale! The recovery process becomes a tall order.

The same happens with your users when they test your software for the first time.

A terrible user experience in the first initial phases might lead to them immediately dropping out of your application without giving it a chance. they even get to test things out...



Such a bad experience obviously leads to users abandoning your platform right away.

But at the beginning of this chapter, we mentioned that the UX during the onboarding stage is connected to long-term churn as well.

Think of it this way: You go on vacation and book a room in a hotel. The room is perfect. The service is excellent. You get in and you have everything you need. The staff is friendly and they cater to all your needs. The view is amazing, and everything matches perfectly with what you had read in the online description of the place.

A couple of days later, the shower stops working. A friendly staff member comes in immediately and repairs it. Your overall experience and opinion hasn't been affected by the incident at all. You're still a very happy customer.

Contrast this with another situation in which you get into your room and nothing is as expected. Nobody helps you, it takes one hour to check in. You don't

know how to access your Netflix account, it takes ages to find the password for your wi-fi, the view is miserable at best, and the swimming pool you were promised is still being built.

A couple of days later the shower doesn't work. What would you do?

You would go to the reception, ask for a refund, leave a terrible review, and drive away before even calling somebody to repair the shower.

Mistakes and problems happen. But we're all more forgiving and understanding when the first impression was good.

An issue that occurs in your platform seldom leads to churn unless that's the last straw that really drives your user mad.

A great onboarding experience leaves a permanent positive mark on the customer journey that will enduringly bind your users to your brand and product despite hiccups.



Creating a Fantastic Onboarding Experience

You see now how mission-critical your user onboarding experience is.

It's now your turn to create a fantastic onboarding journey.

□ Cross-Functional Effort

First of all, in order to create a remarkable onboarding journey, you need to understand your role in the process.

Trial users are extremely valuable.

Since onboarding is the key to successful growth (in terms of both trial-to-paid conversion and long-term retention), the first important principle is understanding that every department needs to contribute to the experience.

Marketing, customer success, sales, product management, product marketing, business development, and UX design people need to cooperate, visualize all the steps involved in the journey (log in, in-app messages and support, mails, action flow...), and remove any form of friction for the user at each stage.

Success depends on speed-to-value, UX flow, information, and communication strategy.

Every department has bits and bites of information connected to the user persona, their expectations, and needs.

A great onboarding journey can only be created through the combined effort of multiple units.

□ Set Objectives and Target Metrics

Every step in the journey should lead users to engagement, activation, exploration, adoption, and value.

Set specific objectives and key metrics that define success. A/B test different journeys and don't forget to create customized discovery journeys for different user segments to make sure you attend to their specific needs.

Map the whole journey, the key metrics and targets, and the emotional state of your different user personas on your wall. Monitor and optimize every stage.

Leads users step-by-step to success.



□ Don't Delay Interaction

Quick wins are the key to engagement. As mentioned, action is connected to motivation.

The shorter the time-to-value, the sooner users will feel motivated to invest time in discovering more about your solution.

Typical issues that delay interaction with your platform are connected to:

- a long sign-in phase,
- useless processes that can be covered at a later stage,
- overloading users with tooltips that only present elements in the UI, and
- redirecting users to your knowledge base, a video tutorial, or product documentation.

You want users to interact with your product as soon as possible, achieve their goals in no time, reach that famous “aha moment”, and fall in love with your application.

Self-Determination Theory

Autonomy, self-sufficiency, and fulfillment are powerful triggers that drive intrinsic motivation.

EXPERIENCE OF

- ↳ Autonomy
- ↳ Competence
- ↳ Relatedness



FOSTERS

- ↳ Volition
- ↳ Motivation
- ↳ Engagement



RESULT IN

- ↳ Enhanced Performance
- ↳ Persistence
- ↳ Creativity



You need to send users on specific quests and support them step-by-step with checklists and contextual help that guides them through processes in real time and directly on-screen.

You need to present your solution while users actually complete tasks. Remember the adage: Sshow, don't tell!

That's the reason why successful applications implement user onboarding automation and performance support to segment users and create ad hoc discovery journeys that lead to key feature adoption and value without any frustration, delays, or uncertainty.

In-app guidance is the key to reducing time-to-value and providing proactive support based on what the users try to achieve and their behavior.

Your customer support might be excellent, but if your users reach out to ask for help, it's already too late.

At this stage, they need to immediately feel autonomous and realize how your product story fits with their company objectives and personal KPIs.

↳ user onboarding automation and performance support



□ Intervene

Dormant users require immediate attention!

Inactivity during the onboarding phase is linked to immediate churn. Users are only willing to invest more time and integrate your software in their business infrastructure if they can accomplish all the tasks you mapped in your onboarding journey within the first 24 hours.

It's important that you monitor behavior, set specific rules that trigger automation, and, in specific cases, try to manually intervene by setting up calls with tier one customers that seem to have a huge potential.

Not monitoring your customer health and their activity while you onboard them means wasting opportunities and limiting your growth potential.

□ Create Multiple Champions

The key to product adoption is company adoption.

Don't punish companies for adding seats to your platform. I know that some services' pricing models are based on number of seats.

However, the more users in a specific account profit from your solution, the more internal champions you'll have. And this leads to company adoption.

The person who introduced your software might be promoted or moved to another department. Or they might resign their position. The more people rely on your solution to accomplish their tasks, the more advocates you'll create.

Make this an important goal of the onboarding journey. And again, if you want this to happen, you need to guide users in their onboarding checklist, provide incentives for adding new team members, and show them how to do it (motivation, capability, trigger!).



□ Provide Feedback and Reward Users

Your onboarding journey is based on actions. Reinforce positive behavior and provide feedback.

Sometimes a smiley face when a user accomplishes a key task is enough (think of the famous ape's high five in Mailchimp). Sometimes you need to trigger automation, such as emails, in which you congratulate users and invite them to attempt other key tasks.

The more personalized and customized your communication is, the better results you'll achieve.

□ Show Outcomes

People don't buy software. They buy outcomes.

Provide users with clear reports and show them how their lives have improved simply by starting to use your service.

Don't brag about features. Explain what users managed to do with key events. Celebrate success with your customers!

Design your product and the entire user experience around the success of your customers.

□ Multi-Channel Communication

Use proactive support with in-app guidance together with in-app communication tools and emails.

Don't overwhelm users, but remind them of what they've achieved and suggest new ideas on how they can profit from your service. Always point them in the right direction based on what they've achieved so far and what they intend to achieve in the near future.

Remove uncertainty by showing users that you're always there for them and that you really care about their success.



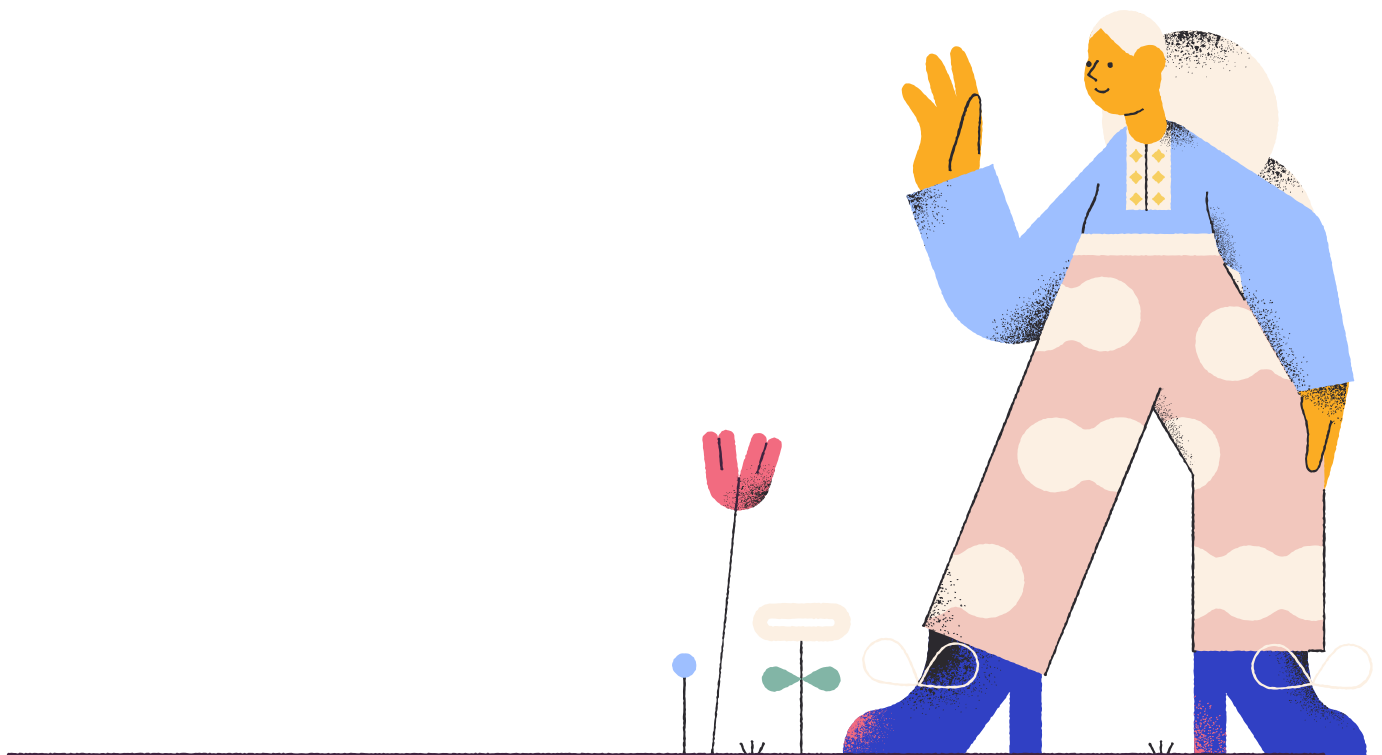
Your User Adoption Journey

The user adoption journey starts in the pre-trial phase with education and brand communication.

The most essential phase is when users get in touch with your product for the first time. You need to deliver on your promises and drive engagement, activation, feature adoption, habit formation, integration, and set the stage for retention.

Over time, if you keep delivering on your promises while constantly improving your service (involving customers) and supporting your users, their customer cycle will align with the renewal cycle.

Your users will wonder how they managed to work before using your software and they'll turn into loyal customers and advocates.



CHAPTER 4

Metrics



Measuring Onboarding Success: Onboarding Metrics and KPIs

Leading users to fully understand your product and its features quickly achieve results is the key to creating a long-lasting relationship with your customers.

That's why it is essential to monitor and improve engagement during the onboarding phase.

The sooner users interact with your product and the more engaged they are, the more they'll feel compelled to continue using it.

Activation and retention are deeply rooted in the onboarding process.

Onboarding is the most crucial step on the road to customer retention. As such, it is important to trace and carefully look at engagement indicators that might signal problems during this phase.



Onboarding Engagement Metrics

Engagement during onboarding can be calculated by looking at a checklist of necessary tasks that need to be completed to start using a product efficiently and measuring how often and how fast users go through the entire checklist.

Customers who go through all the most important onboarding steps within 24 hours are 80% more likely to convert (according to a study conducted by Groove).

Product managers, and UX designers need to have a clear overview of micro and macro goals that users need to achieve. Users need to be provided with a checklist in which they can tick off goals and be rewarded for it. This way you can guarantee feature adoption and activation.

Userlane offers such a checklist in combination with **on-screen interactive guides** that steer users through onboarding process in real time to make sure that the process is as fast and as effective as possible.

There are several ways to calculate onboarding engagement.

With our analytics, you can visualize such metrics to identify areas that require your attention so that you can adjust your UX and your onboarding process accordingly.

Onboarding Engagement =

Users that complete
the onboarding process %

Users that start
the onboarding process

Users that achieve all onboarding
goals within 24 hours after signup %

Users that go through
the entire onboarding process

Median value of key tasks completed

#key onboarding tasks to complete

- Average time ofr users to accomplish all the onboarding tasks.
- % rate of progress through each onboarding step



Number of Key User Actions per Session

This can be considered a vital KPI for product and customer success.

You can start by identifying key actions that users need to take in your software and track them over time for different customer segments.

For a software solution like Autopilot, for example, such an action could be number of journeys created, and for Facebook this could simply be number of ads published or edited.

Again, looking into the difference in this value between churned and retained customers, you can see how you can promote engagement in order to reduce churn.

It's also important to monitor this value over time and compare the results to see how engagement fluctuates over time for different customer segments.

of Key Actions per
User per Session
=
Median value of key
actions per session

Product Adoption

Product Adoption refers to the combined effort of successfully onboarding new users while retaining existing customers.

It's an absolute value that merges growth and retention.

Product Adoption
=
Growth + Retention



Rate of Adoption

Once you define key indicators that point at active users, you can take the number of active users over the total number of subscribed users to determine your adoption rate.

I presented this metric in the section about the number of active users using the term ‘% of healthy users’ since this metric is both connected to product (as adoption rate) and customer success in terms of customer health score (see below).

$$\text{Adoption Rate} = \frac{\text{\# of active users}}{\text{total \# of subscribed users}}$$

User Engagement Metrics

You first need to define behavioral patterns which are connected to the outcomes of your solution and to the key features you offer.

Generally speaking, active users, average session duration, and number of key actions already provide a pretty good framework to assess engagement.

Additionally, you can introduce other metrics which define user engagement and retention over time:

D1, D7, D30, W1 Retentions

These values indicate the percentage of users who are active after one, seven and 30 days after signing up.

These values can be represented in a waterfall cohort analysis form or through a retention curve.

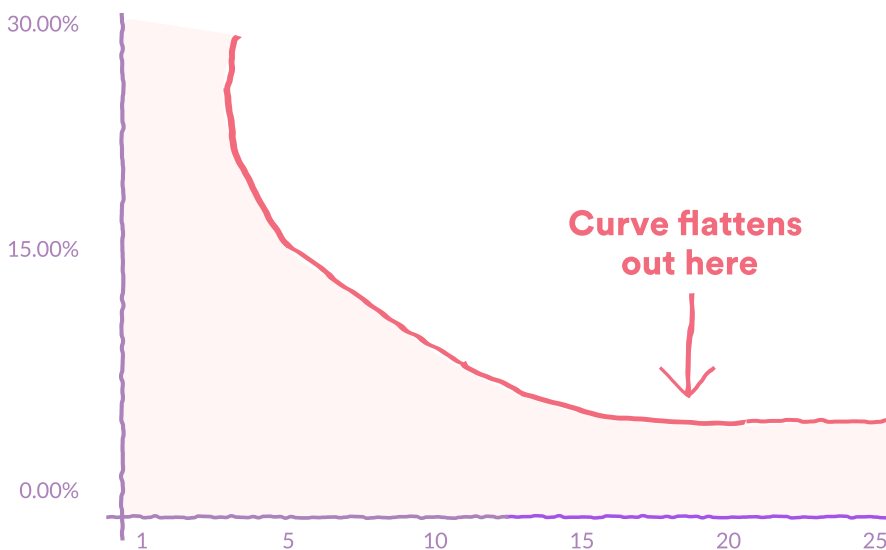
In particular, W1 retention is an essential metric that you need to optimize to increase customer retention. The majority of users churn during the first week after signup.

D1, D7, D30, W1 Retentions



D1, D7, D30, W1 Retentions

The sooner you lead users to success, the higher the chance of retention. After a certain point, there's nothing you can do to decrease churn.



Improving retention over this critical period with proper onboarding and activation has a durable effect on the entire retention curve.

Identifying customers who don't engage with your product at an early age and setting specific triggers connected to an action plan (tailored offers, one-on-one strategy sessions, customer support calls) can lead to a much higher number of conversions and active users.



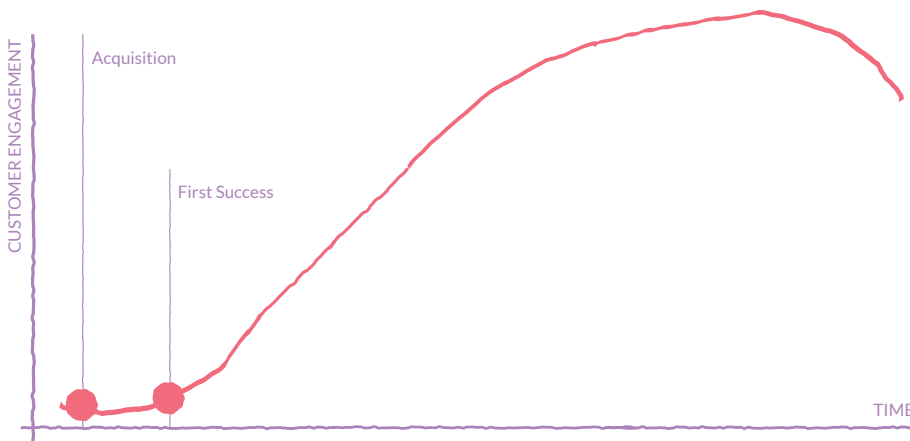
Time to Value

That's an onboarding metric which truly defines the success of your business.

It measures the time it takes for a customer from signup to first results and that famous “aha! moment”.

Any minute of delay between signup and quick wins increases the chance that a customer simply drops off during the onboarding phase to most certainly never return back.

To improve this metric is necessary to optimize your user onboarding process and offer guidance to quickly lead users to achieve their goals.



Time to Value

=

▲ time from signup
to first achievement

Time-to-Value

Quick wins that happen early in the onboarding journey affect the steepness of the curve and therefore, the effect on engagement.



Feature Adoption

This metric is a quick primer for customer success and product management teams.

Every time a new feature is introduced (maybe following a feature request) the product team is obviously excited and would love customers to promptly try it out.

With increasing competition in the SaaS market, product innovation is essential. Therefore, feature announcements and feature adoption become important to make sure that your customers follow the developments in your product roadmap.

Feature adoption during onboarding and in subsequent stages is linked to the realization of how valuable your product is and is a mission critical step toward customer retention.

Feature adoption in itself only measures the efficacy of your feature promotion (think of emails, popups, red counters next to a bell, incoming messages, or flashing gift packages).

Knowing that over 40% of your users adopted a new feature over the course of the first week after roll out means little to nothing.

$$\text{Feature Announcement Efficacy} = \frac{\text{\# of Users who tested your new feature}}{\text{Total \# of Active Users}}$$

The real added value of feature adoption lies in how many customers tested your new feature initially and continued to use it over time. If your users never actually use a particular feature after testing it when it was launched, your feature adoption level is still low, independently from how many customers were enticed by your announcement.

A thorough feature adoption analysis takes into account the depth of adoption, the time for adoption, and the duration of adoption.



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$$\text{Feature Announcement Efficacy} = \frac{\text{\# of Users who adopted your new feature}}{\text{Total \# of Active Users}}$$

$$\text{Time for Adoption} = \text{Avg } \blacktriangle \text{ time form feature announcement to Adoption}$$

$$\text{Duration of Adoption} = \frac{\text{\# of of times users use the new feature at different points in time}}{\text{Total \# of Active Users}}$$

Such indicators can be tracked for different customer segments especially if the feature was developed for a specific target group.



General Feature Usage Metrics

To evaluate the solidity of your customer persona research, product-market fit, product roadmap, and product marketing strategy, you need to identify basic measures connected to feature usage and feature usage per customer segment.

Following an MCI analysis (see customer metrics below) and collecting feature requests you can introduce new functionalities without relying on assumptions.

Initially, though, you can only rely on market research and business development to prioritize projects in your roadmap.

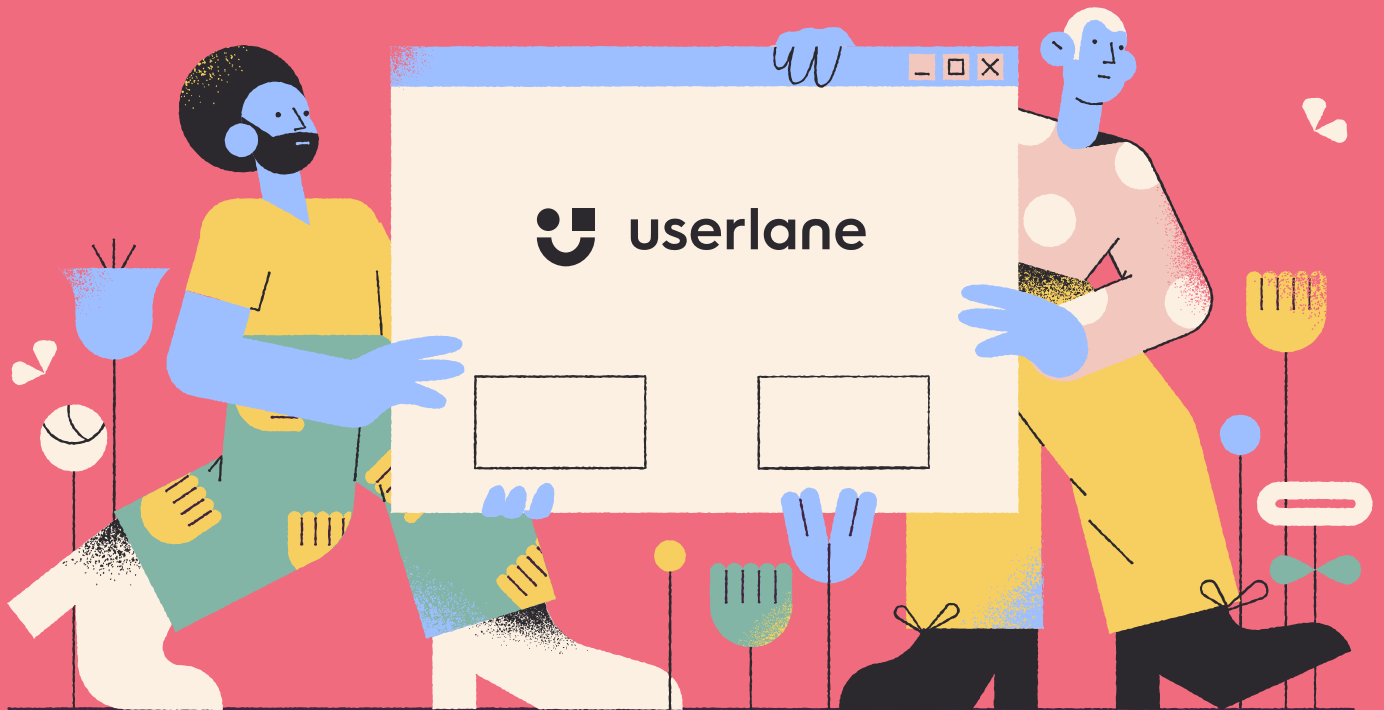
Feature Usage metrics evaluate the validity of your assumptions and of the research data you collected.

Particularly it is interesting to know:

- How often a particular feature is used
- What sets of features tend to be used by what user segment
- What feature generates confusion or frustration
- How much time users spend with a particular feature in comparison to total time spent in the product
- What user segments seem to be indifferent to the feature
- Feature adoption (see paragraph above)
- Temporal trends that might show a distinct pattern



Interactive Guidance



When and Why a Software Application Requires Guidance to Create the Perfect UX

I'm sure you've noticed that in virtual or online games, game developers introduce complexity in steps: The more users become familiar with the environment and its rules, the more complex the game becomes. And players are onboarded directly within the very same application.

Some applications are easy to use because they just do one thing and one thing only. Think of a simple picture resizing app or a video streaming platform.

Other applications, especially B2B software, present a high level of complexity, which derives from the sheer amount of options, features, and functions that they offer.

Therefore, complexity has nothing to do with the user interface!

You simply can't reduce complexity and improve the UX by adjusting the UI. The only way to simplify software would be to remove all features and lead users to make one single choice.

But can you sell a solution that only does one thing? Not really.

Imagine if Autopilot only allowed you to write an email and send it to a specific address, or if Salesforce only allowed you to list names and addresses of customers ...

Features, options, and customization are what make software applications awesome and allow users to meet their objectives. But this comes at the expense of usability and a smooth and fast onboarding.



Directions

Our road network is full of great design features: Lane markings, street signs, roads to follow, intersections, and many more. They are very simple and easy to understand, even in a foreign country.

People don't need that much time to become familiar with the traffic language and memorize the meanings of signs and markings. Our road network's user interface, so to say, is great.

Yet, we still rely heavily on our car or phone's navigation system to guide us through it. Why then, if this road network is so easy to understand, do we still rely on guidance to get from point A to B?

Our road network shows us the names of the streets or the direction to take at each intersection. They show us where the next turn will bring us: Turn right and you'll reach Madison Lane.

But as users, we don't care about the next street in a series of directions. All we want is to arrive at our destination - the options in between are only steps between here and there.

If I'm in Manhattan and want to go to JFK, knowing that I'm in Washington Square doesn't help me much. I don't want to know where I am and that's only half of my problem. I want to know how to go from Washington Square to JFK. Turn by turn!

What I'm trying to say is that the streets in western towns are clearly marked. You should always know where you are.

The real problem, then, is not how clear a street sign is or isn't. The real problem is how to go from one

place to another without a map or guidance.

Street signs in New York are an example of good UI. They're easy to spot and clearly labeled. But if you're in Munich, Germany, for example, things might be harder as street signs still use old Gothic characters and names can be pretty long and basically unpronounceable. If you're a foreigner you'll have a hard time reading them (bad UI).



But let's say you've gotten used to the beautiful, albeit impractical, shape of the letters and you can read street signs even though you're driving 50 km/h ... you are aware that you're on Hinterbärenbadstrasse and you know that your destination is Ebereschenstrasse. But what's missing?

Even if you can name every street, you'll still either need an overview (a map) or turn-by-turn guidance to get to your destination. Well, unless you just want to drive around for a long while and hope to miraculously land up where you need to be.

An Example of Bad UX

When you buy tickets for public transportation in European cities, the interfaces are simpler than simple: Big buttons, descriptions everywhere, and huge characters and icons. They are easy to understand and operate.

Yet, everybody hates the experience because the ticket machines only show users a set of predetermined options they have to choose from. What I want to know, as a user, is NOT what options are available - I just need to know which option is the right one for my needs! Which particular ticket do I have to buy for my trip?

People need to make this call under stress and time constraints, and we all know that public transportation doesn't wait for anyone. The user interface, despite being clear, doesn't solve the problems that contribute to such a horrible experience.

Users don't need to be presented with options but solutions.



Guidance

Street signs are a primitive form of guidance. In large public buildings, you might have encountered smarter tools, such as colored lines on the floor. These floor markings are there to help you reach your destination quickly.

When you land for the first time at an unknown airport, you can go from your terminal to baggage claim without a map. Directions allow you to quickly go from the plane to your taxi cab in the most efficient way.

This reduces the frustration you experience in airports. There obviously are exceptions. At Heathrow, for example, signs either disappear after a while or simply change color and text to make things more puzzling and 'entertaining' for passengers.



Software and Guidance

The same concepts hold true for software. You might be familiar with the user interface because icons and menus are clearly defined by symbols and tags. But the real problem here is execution.

You don't really know what the software is actually capable of, and the first time you use it, you aren't sure how to approach a specific problem.

If you've never worked with SAP, for example, the first time you open a module is like looking at the dashboard of a Boeing 787. There are millions of options, and if somebody asked you to issue an invoice or order a spare part from a supplier, you'd probably start panicking (like a pilot who flies solo for the first time) despite the fact that you're seeing familiar icons and menus.



The Problem Is Not the UI

After dealing with several applications, you get used to the language developed by UI designers. You sign up for a brand new piece of software and, most of the time, you immediately understand menus and icons.

A well-designed interface is precious, but knowing what each button and menu does is only half of the story.

Let me give you a practical example. You might be familiar with Hubspot. The main interface is clear, and you're familiar with reports, right?

But now you need to create automation that requires you to sync specific Salesforce triggers with certain Mailchimp and Outreach contact segments ... 1,2,3 go!

For some of you, this might seem easy enough because you've already done it.

But you might get stuck if you're trying to create complex automations for the first time.

Again, the problem is NOT the interface. The main problems are:

1. Knowing if this is feasible
2. Knowing how to achieve the goal
3. Not getting lost and accomplishing the task in the most efficient way

Most software applications out there follow rigorous design rules, which draw from familiar elements and therefore create an almost universally accepted language. Information is also structured in ways that facilitate usability.

But we need to know how to achieve our goals!

Again, the problem is NOT the interface. The main problems are:

- 1. Knowing if this is feasible**
- 2. Knowing how to achieve the goal**
- 3. Not getting lost and accomplishing the task in the most efficient way**



Solutions to Software Navigation Problems

Software providers try to solve the problem of complexity in different ways.

One way is having a support center. You can help your customers on the phone, via live chat, or via remote support during onboarding and at later stages.

Needless to say, this solution is expensive and time-consuming for both you and the client. And it is definitely not scalable.

Plus, if a user needs support, it's already too late. Chances are they're already frustrated!

Another solution is adding documentation, such as videos or text documents that explain every single process in detail.

Well, for you, this means producing lots of literature and updating it every time you change your UI. And for the user, using external documentation means leaving the application, collecting information, going back to work, checking again, going back to the interface ... you get the idea.

This solution is like driving in New York City and parking every few blocks to check the map and get back on the road.

I'm sure you'll agree with me that this solution is inconvenient. Once a user leaves the platform to look for information, especially during the onboarding phase, odds are that they'll never come back and will start looking for alternative solutions instead.

Nowadays, cars are equipped with navigation systems. This represents the best solution to all the problems connected to cities and mobility. Therefore, it's obvious that software should come with built-in guides that show users what to do and at what point while they accomplish tasks.

The best way to onboard users and guarantee a frictionless user experience is to have built-in interactive walkthroughs that guide users through all the features of a software application step by step.

As mentioned, all modern cars now come with a built-in navigation system, which guides drivers in real time. At the same time, modern software now comes with built-in walkthroughs that guide users while they work with it.

If you're in New York and need to meet a friend, your GPS will guide you through the streets of Manhattan - all you have to do is concentrate on driving. In the same way, onscreen walkthroughs guide software users through processes in real time so that they can concentrate on the results.

This is why we love our GPS so much! We don't need to learn every route by heart. We simply enter the beginning and end points and voilà, we are now masters of the road with knowledge dispensed at our fingertips.

Whether we are exploring a new city or driving through an uncharted country, our navigation system leads us to our desired destination safely. What a great user experience!



Enhancing UI and UX with Onscreen Interactive Guides to Bypass Complexity

Users need to be taken by the hand and guided in real-time through the software in order to achieve their goals as quickly as possible. The everyday user is easily stressed out by their daily routine and problems and doesn't have much time to figure out how to overcome every single issue in a piece of software.

They simply can't handle another obstacle in their path. This is why you can't let your software become another hurdle between your users and their goals.

One way to ensure a great user experience is to provide your users with a very short list of goals that they can achieve within your software . From there, you can guide them through your system in real time and help them achieve each single objective.



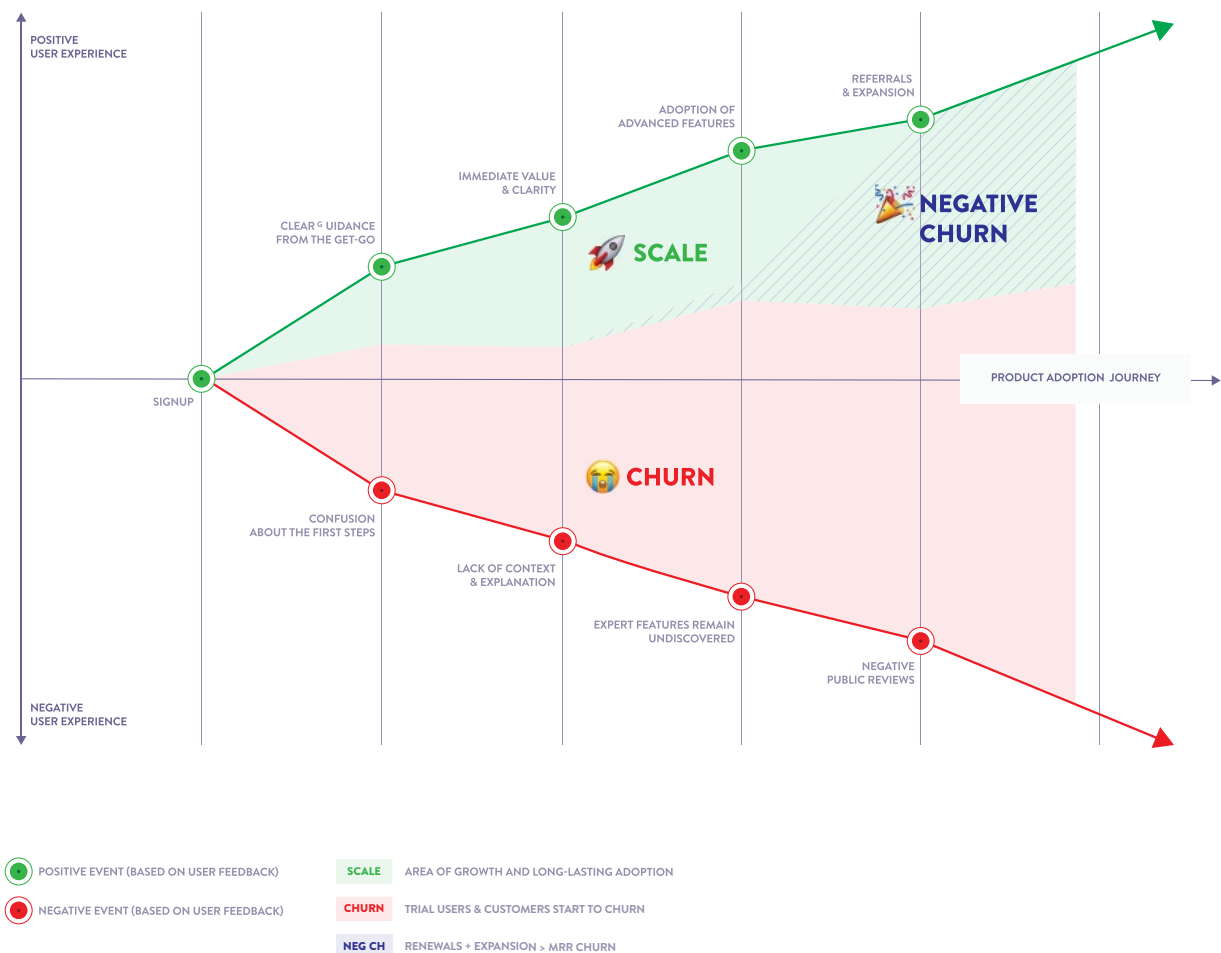
Guiding users through a process in a piece of software means making decisions for them that lead to the best outcome in the most reasonable amount of time.

Twenty years ago, software was delivered with thick manuals. Ten years ago it became obvious that video tutorials would replace handbooks.

Now software has finally implemented automatic guidance, and in a maximum of five years from now, every application will include onscreen interactive guides that steer users through process in real time.

The Effect of UX

A great UX throughout the entire user journey is one of the most important factors that lead to retention and expansion, and ultimately, to chasing the dream of negative churn.



2019 | Userlane.com has conducted research on user experience and product adoption with thousands of companies across all industries and sizes. The chart above shows the difference in perceived experience. The research is based on more than 800 responses from end users and the assistance of over 100 leading SaaS-companies.

What Can Onscreen Guidance Be Used For?

With on-screen guides you can create:

- Guided onboarding tours (AKA walkthroughs)
- A library of guides that can be accessed by the user via the virtual assistant or hyperlink. Such guides provide contextual interactive performance support for the end users.

When onboarding users, these onscreen guides can be used to present all the main advantages of the application while allowing users to set up the environment and start working with the solution.

Afterwards, these walkthroughs can also be used to steer people in real time within the application so that they can accomplish tasks while being guided

without any external support.

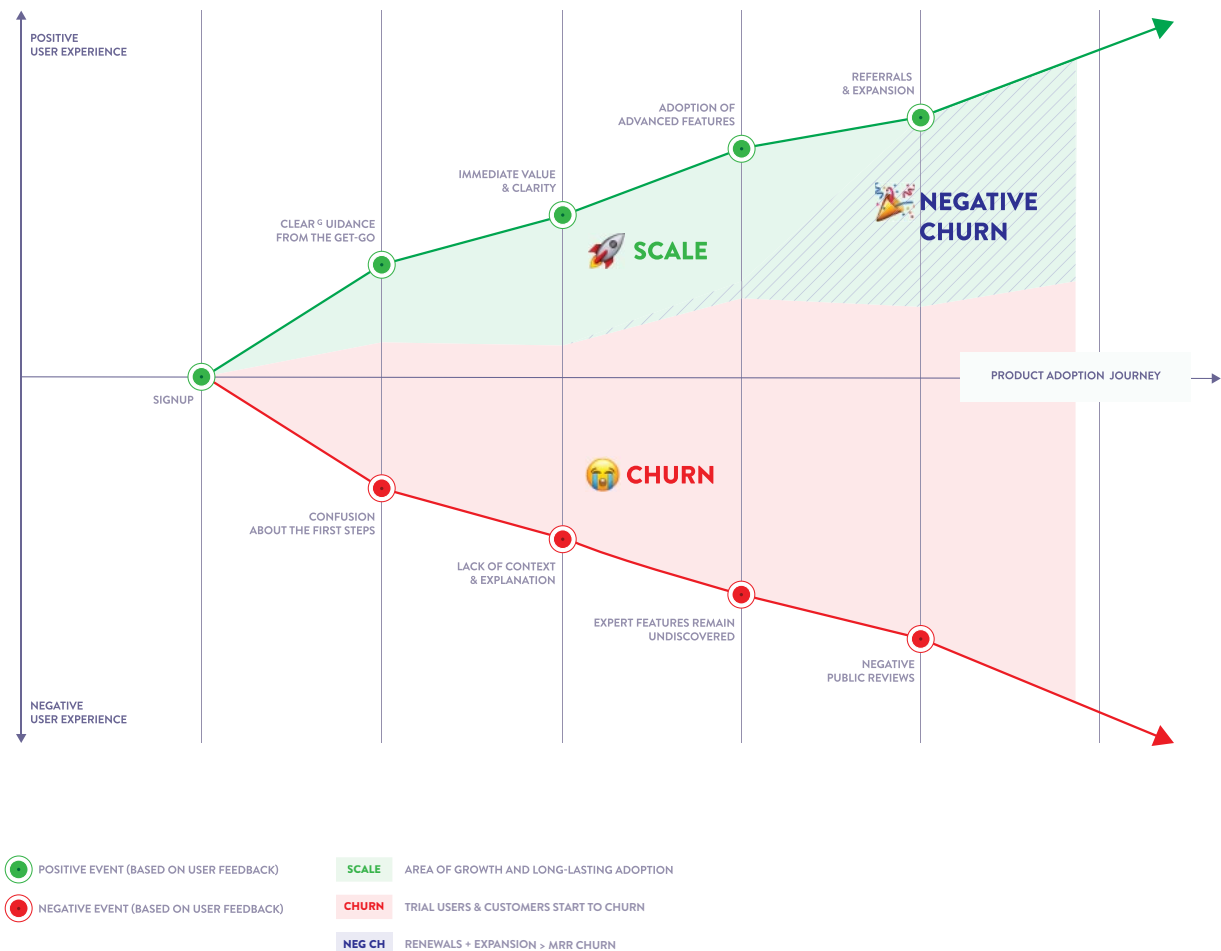
Guided onboarding tours take newly acquired users through all the features and benefits of the solution they're testing or learning to use. Guided tours, which are fully interactive, are importantly unlike tooltips, meaning that they don't just simply point at elements in the UI explaining what each icon or button does or where to find a menu.

Onboarding tours and process walkthroughs need to be fully interactive: They should not only guide users through the interface but also through all the necessary steps they need to go through to set up their working environment and immediately become productive and efficient with the new product they're trying out.



The Positive Effect of User Guidance

We carried out research with 800 software users. The median result of the perceived UX with Userlane is much higher than the median of the answers connected to applications that don't implement guidance. Userlane has a clear positive impact on user experience which, in turn, is a crucial factor that leads to growth.



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Userlane

Userlane closes the knowledge gap between humans and machines. Our software enables anybody to effectively and efficiently use any application immediately without any training or instructions.

With Userlane's onscreen guides, users are guided through the processes in real time. They can access an interactive guide at any time and with that, the virtual assistant takes them through each step in a process exactly as a flight instructor would do with a novice pilot.

User Onboarding and Retention Phases

USERLANE							
Onboarding phases	1. First Touchpoint	2. Educational	3. Trial/Conversion	4. Engagement	5. Activation	6. Integration	7. Customer Success
When	Before prospect visits your website	Prospect is on your website or blog	Trial/Test Phase	Trial/Test Phase	Trial/Test Phase	First 90 days	Month 4 and beyond
Goal	Conveying personality, authority, trust, expertise	Showing Scope/ Brand/ Company/ People/ Problem/ Solution	Creating best UX that immediately leads to quick-wins	Discovery journey, commitment, feature adoption	Discovery journey, commitment, feature adoption	Multiple users, Product integrated deeply into processes	Long-term-retention/ Advocacy/ ROI
Potential Issues	No Traffic / Attention	Low traffic to demo/trial rate	Low Trial to Paid Conversion Rate/ Immediate churn	Low Engagement Rate/ Immediate Churn	Low Engagement Rate/ Immediate Churn	Limited Integration/ Mid-Term Churn	Long-Term Churn
Tools	Ads, Mentions, Social Media Presence, Content Curation, Partnerships	Copy, explainer videos, live chat, pictures and charts, screenshots, live demos	On-screen interactive guides, walkthroughs/ tours	Onboarding tours/ walkthroughs, virtual assistant, onboarding checklists	Virtual assistant, guidance, emails, educational content, one-on-one check-in phone calls, customer health monitoring tools	Continuous Guidance, virtual assistant, customer success tools	Customer success software, automation, customer support tools, customer success program, customer support guided walkthroughs
Departments Involved	Marketing, Business Development	Marketing, Sales	Product, UX, Marketing, Sales	Product, UX, Marketing, Sales	Sales, Customer Success	Sales, Customer Success	Customer Success, Customer Support, Product



Guidance leads to security and stability.

With our guides, SaaS companies can present their product to each user individually and convince potential customers of the value of their product.

Guidance leads to security and stability.

Our walkthroughs allow software owners to convert and onboard users while offering a frictionless user experience from the very first interaction with their brand.

By addressing support tickets with step-by-step guides and allowing users to seamlessly interact with the application in an optimal way, software owners can foster loyalty, enhance activation rate, and eventually reduce churn.

For SaaS owners and product managers, Userlane represents the optimal automated onboarding solution and a precious instrument of retention.

Userlane allows you to create such a navigation system without changing the underlying software and without any coding knowledge. You simply click through the process in your software in the editing mode and the interactive walkthroughs are automatically built in the background.

With Userlane, you can provide users with solutions, not with options.



When a new user opens your application, they're welcomed by a virtual assistant, which will guide them through any process live within the software. This virtual assistant can always be recalled on screen so that users can access their list of guides, which are divided into chapters, whenever they need to.

For example: Say the user is required to add a new supplier to their database. They can expand their virtual assistant menu, find the corresponding guide, and follow the simple onscreen instructions that show them where to click next and what information they are required to enter at each step until the process is complete.

This approach makes training redundant and improves the UX by eliminating uncertainty and frustration.

That's why a large number of SaaS companies implement on-screen guides to create onboarding tours for their trial and new users and why companies worldwide introduce these walkthroughs to onboard and train staff on their own software stack.

Userlane is the perfect solution for companies that want to improve their competitiveness and efficiency through change management. With Userlane, you can circumvent the hassle and make the introduction of new procedures and applications entirely automatic, instantaneous, and seamless.

This is why the best way to onboard users and guarantee a frictionless user experience is by using built-in walkthroughs.

Onscreen walkthroughs guide software users through processes in real time so that they can focus on the results.

When onboarding new users, interactive guides steer people through all the steps that are necessary to use the application successfully while also presenting unique features and benefits in the correct order of complexity and importance.

With interactive on-screen guidance, users will:

- Immediately comprehend the purpose of a product
- Quickly achieve the first results within the application
- Become aware of the benefits of that specific solution immediately
- Become happy users who will be a lot more likely to turn into loyal, paying customers

And this can only be achieved through a seamless integration of UI design, UX design, and support.

Walkthroughs are also beneficial at later stages when users need to perform complex operations.

Userlane is not a solution that aims to replace UX design. Userlane is a proactive tool that product managers, product marketers, and UX designers need to implement to enhance customer experience and to ensure customer success.



How to Integrate Guidance in Your Application

Coding built-in guides is a very taxing activity. Plus, every time something changes in the application, your developers will need to adjust or modify all the related walkthroughs.

But the whole thing can be a lot easier.

You can check out our [editor](#), which allows everybody to create onscreen guides for SaaS applications without coding.

Userlane onscreen interactive guides are represented by a simple overlay that goes on top of the uppermost layer of any software interface.

To add Userlane to your application, all you need to do is paste a short code snippet to connect the application to Userlane (much the same way you add a code snippet to your site to implement Google Analytics).

From that moment on, it is possible to access the dashboard to create and manage the first interactive guides.

Creating guides does not require any coding or technical know-how. The only step that actually involves engineers or product managers is when adding the snippet to the code.

After this, anyone can create guides in minutes without changing anything in the software itself.

Anybody in the company can create guides, including customer success managers, product managers or product marketers in SaaS companies that implement Userlane in their software, IT managers, and HR training personnel in companies that implement Userlane to train their own employees on their software stack.

anyone can create guides in minutes without changing anything in the software itself



Userlane: Allowing Anyone to User Any Software Instantly

Whether you're onboarding new customers or training employees in a new software application, a successful onboarding is absolutely critical if you want to achieve results. By offering a fully interactive experience where users are guided step by step and in real time in any browser-based software application, Userlane ensures that users learn how to use the software instantaneously and effortlessly. Userlane eliminates decisions users are not strictly required to make, thereby preventing procedural mistakes and giving each user the confidence they need to perform all tasks efficiently and effectively within the software application.

In the era of digital transformation, rapid technological changes, and increased competition, companies simply cannot afford to fall behind. Almost everything we do these days is connected to a specific application and digitization is ubiquitous - there's definitely no escaping it! In the digital era, companies rely heavily on cloud services and browser-based applications, and people, in general, are required to operate, or at least be familiar with, many applications, some of which are highly complex. Interactive guidance guarantees security and stability and increases software adoption. For employers and employees alike, Userlane thus facilitates digital transformation and change management processes and ensures that employees are fully operative from day one without the need for training manuals or prior knowledge.

Always remember that we, as users, have a limited attention span, and we also don't have time to waste.

We all want to see results and achieve quick wins. With Userlane's guides, every element in the UI is blocked out except for the one the user is required to interact with, meaning that the user's attention is directed to one specific action. This leads to higher engagement and feature adoption and enables users to achieve results in the quickest way possible. Guides also lead to habit formation and muscle memory and mitigate the forgetting curve via synchronous learning. This actively prevents employees from searching for external help. This saves time, reduces training costs, and leads to knowledge retention.

For SaaS companies, interactive guides allow companies to present and sell their software solution, automate and tailor the onboarding process, and increase conversion, engagement, activation, and retention rates. And always remember: While you might offer an awesome UI, the complexity of your software is not connected to the UI. This means that despite having a great UI, your new users will still find it difficult to navigate through all the complex processes in your software. And when users feel lost, they'll simply log out and look for something else. For SaaS owners and product managers, Userlane thus represents an optimal automated onboarding solution and a valuable instrument of retention. So, if you're an organization looking to automate and scale your staff training and increase the speed of software adoption, or if you're a SaaS platform looking to increase customer retention and minimize churn significantly, then Userlane is the perfect solution for your company.





One of our core beliefs is that software should adapt to people and not the other way around. Empower users with Userlane today.

START NOW →

