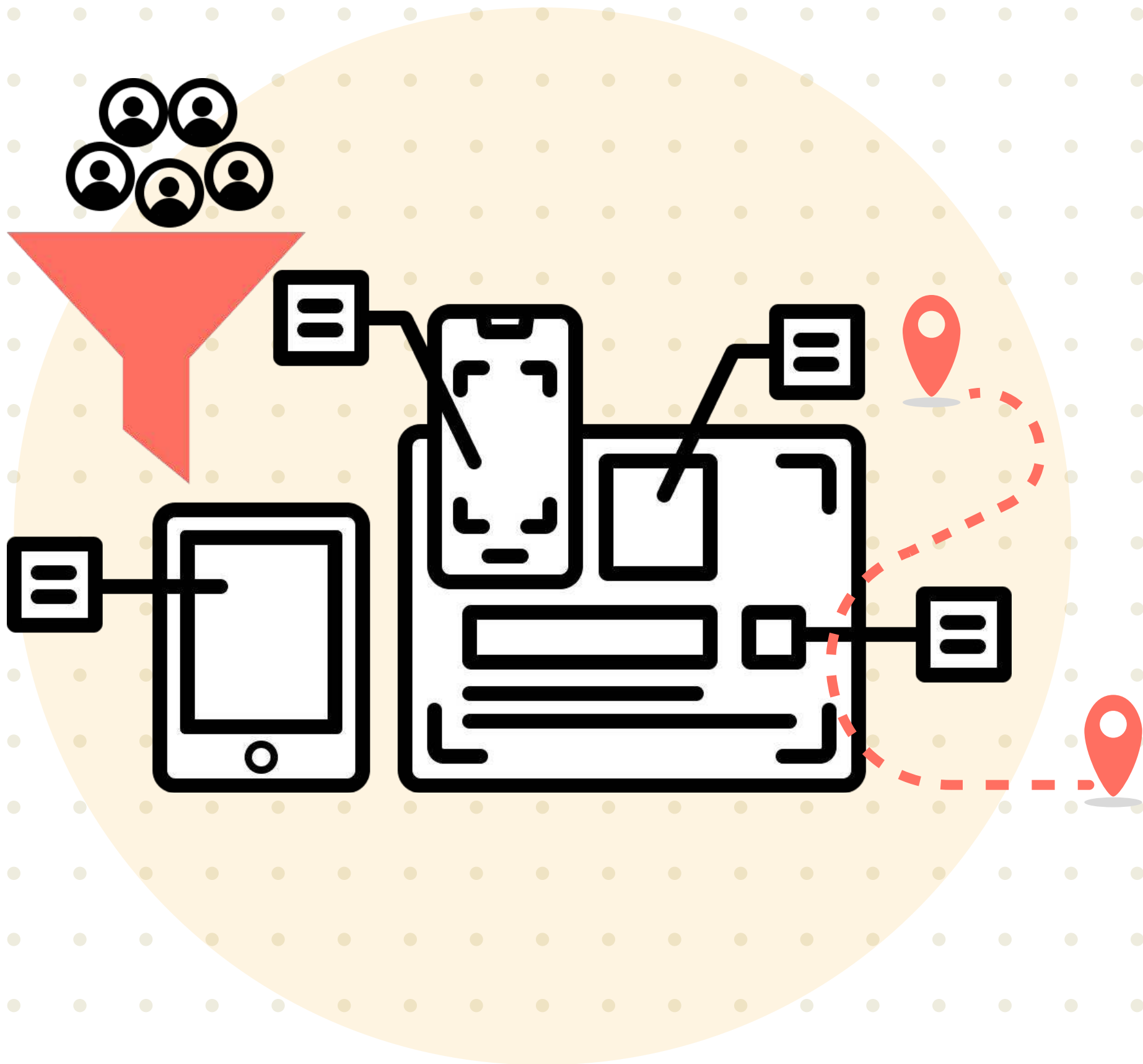How to Create a framework for

Improving User Onboarding
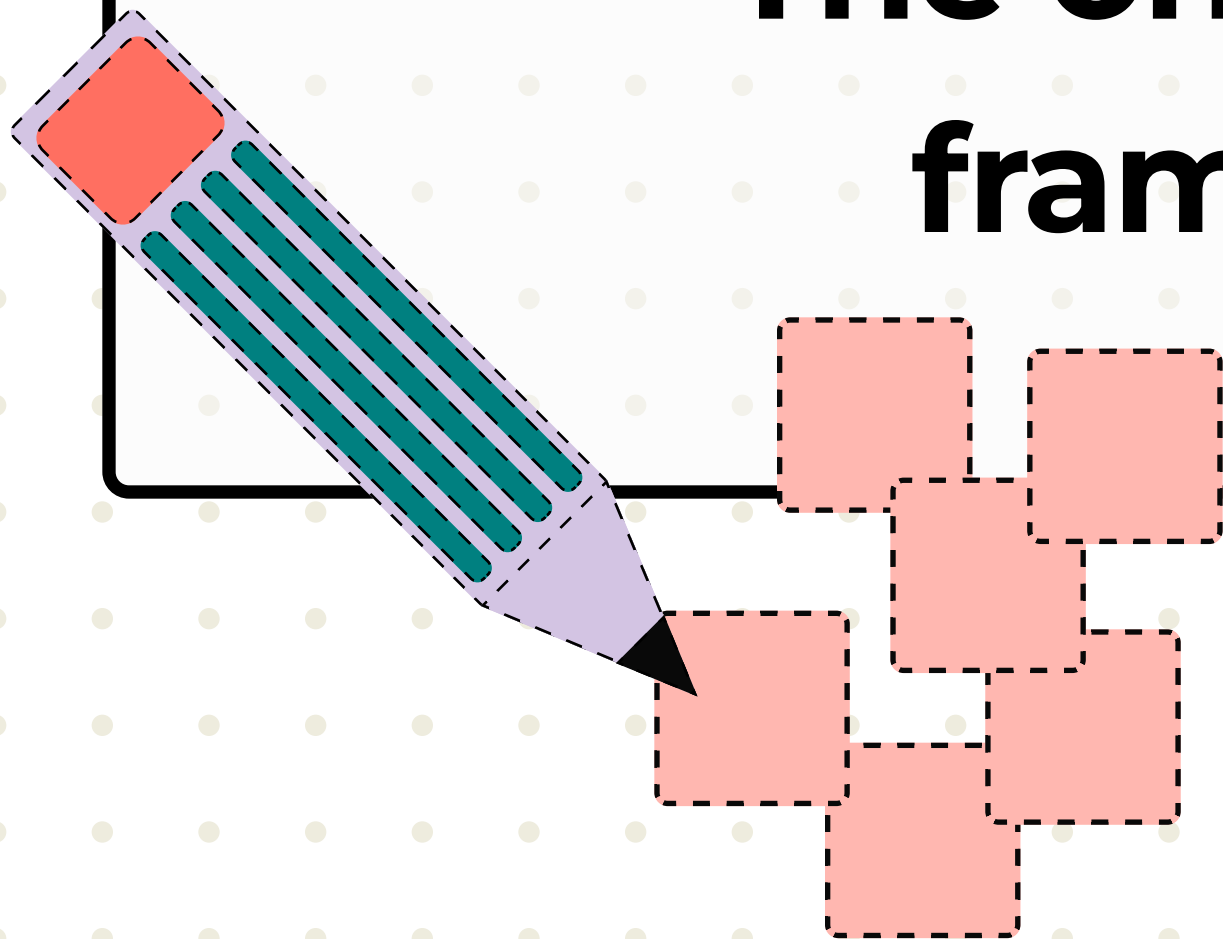
User onboarding is the crucial step for retaining the users you've acquired through all your marketing efforts.

It can be achieved with good UX!

If customers don't perceive the value you're offering, they'll churn.

The onboarding framework

User onboarding framework has 5 steps:

1- Define customer success

This doesn't refer to trial conversion! It means users taking the necessary actions to achieve their goals with the product.

2- Map the product's milestones

This isn't a typical detailed journey map that outlines every possible path. Instead, it's more of a user journey funnel designed to pinpoint churning points.

3- Find the frictions at macro level

How does the overall journey appear? Where are users encountering issues? This assessment can encompass both qualitative and quantitative aspects.

4- Clear the path

Investigate how and why the blockers are occurring. This is where user onboarding tools come in handy too!

5- Measure and iterate

Bear in mind, this is an ongoing process! Make sure you track the success of the process once completed and keep revisiting it regularly.
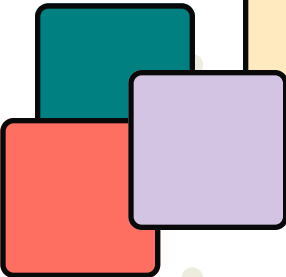
Have you signed up to your product recently?

How's your first time user experience?

Define customer success

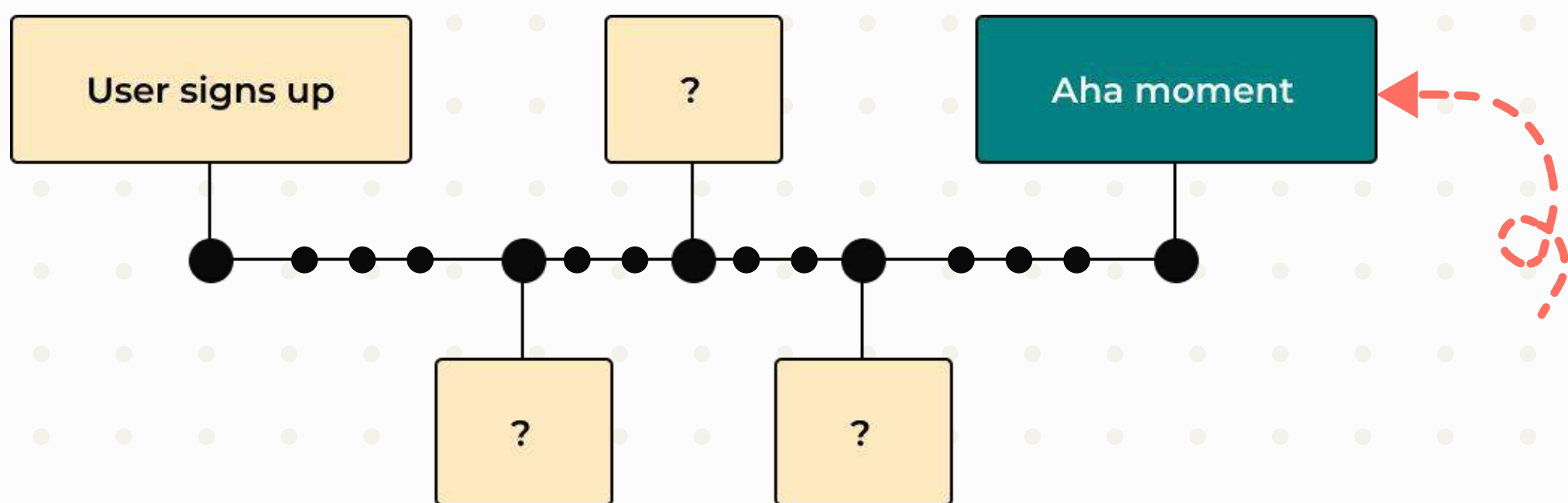> ⚠️ It's not about the business!
>
> It's about the users!

Why is the user here?

It may seem obvious, but why has the user signed up? What does it mean for them to achieve their goal using your product?

→ This can also be referred to as the "aha" moment. The more user research, product research, and behavior analysis you do, the easier this becomes.
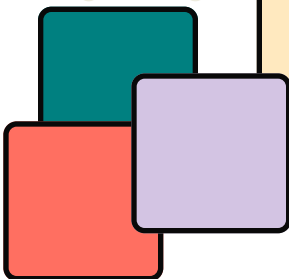
| User signs up | ? | Aha moment |

? ? ?

Map the product's milestones in user's journey

⚠ Have the user in mind!

What are the main steps the user can take?

Clarifying and identifying the milestones of the product is crucial for tracking and measuring its success.

- Identify the main value propositions.
- Identify the paths leading users to achieve these milestones.
- Map out the overall journey and identify the tasks required.
- Identify the success metrics based on these milestones.
- Set up methods for measuring these metrics: Are they qualitative or quantitative? Should you speak to users, track their behaviours, or rely on analytics tools?

Map the product's milestones in the user's journey

There's not necessarily one "aha" moment or milestone in the journey.
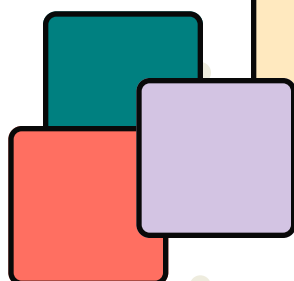
| User signs up | 2 | Aha moment |

1

3

User signs up

Milestone 1

Milestone 2

Milestone 3
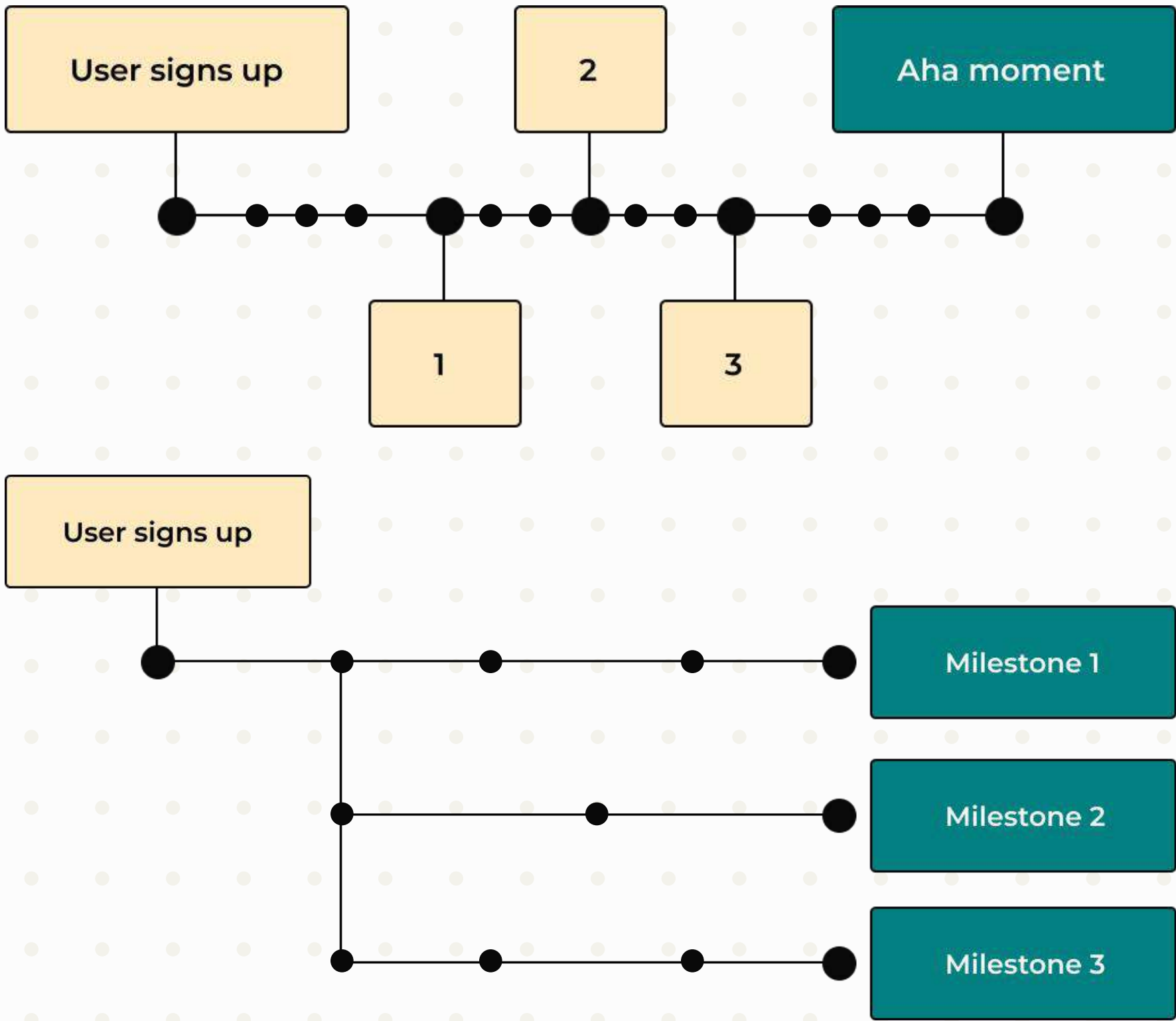
Find the frictions at macro level

⚠ This can be both qualitative and quantitative!

Slide for more ›

What are the main friction points?

Based on the defined success metrics, you can identify the main friction points in the product's journey. Methods for identifying these points can vary depending on the success metrics.

Example: In email campaign softwares, if a user is trying to set up their first email campaign, the main CTA button should be available and accessible. If this button is hidden, unavailable, or conditional, it will create a friction point in the user's journey toward achieving the milestone.

The path to achieving this milestone should be observed, measured, tracked, and maintained.

Rely on statistics!

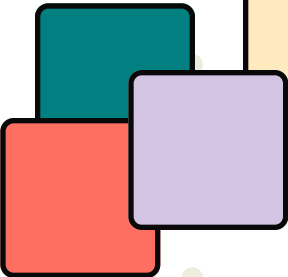Funnel diagrams are a great source to rely on to monitor this.

Sign up

100%

of acquired users

Step 1

Step 2

Step 3
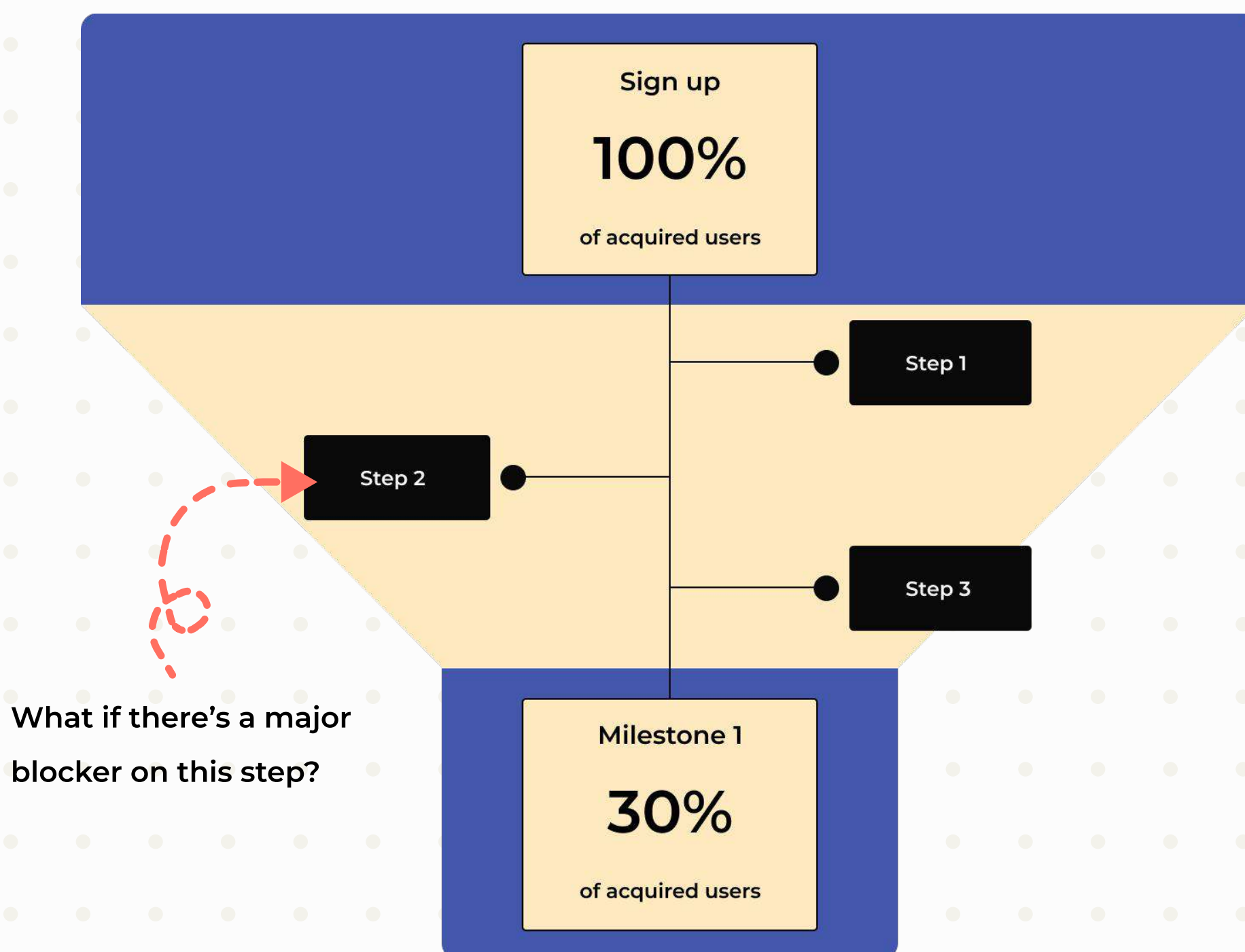
What if there's a major blocker on this step?

Milestone 1

30%

of acquired users

Slide for more

Clear the path

⚠ Explore the options, can you do better UX?

Slide for more ›

Simplify the user's onboarding process

Find ways to streamline navigation, reduce steps, and

provide guidance to users.

- Ensure unnecessary blockers are deferred to later stages.
- If your product requires a complicated installation

  process, deliver immediate satisfaction to get users and

  get them invested enough to willingly go through the

  harder steps.
- Repeat this process for all identified milestones.
- Monitor user progress through these steps and keep track

  of user behaviour and happiness throughout their

  journey.

Measure and iterate

⚠ It never ends! Keep going back, keep optimising!
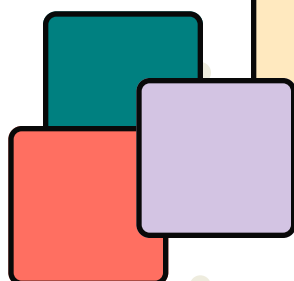
It's an ongoing process!

Tracking onboarding success metrics is crucial to determining if your product is performing well. Metrics such as:

- Time to first value
- Completion rate
- User satisfaction

These metrics can provide a good overall picture of the success of your user onboarding. Alongside other metrics you've defined in different steps, they should be constantly tracked, measured, analysed, and monitored to ensure you're on the right track.

Proper user onboarding saves costs, adds value and gains satisfaction!

Implementing the five steps and monitoring the improvements are key to achieving customer success.
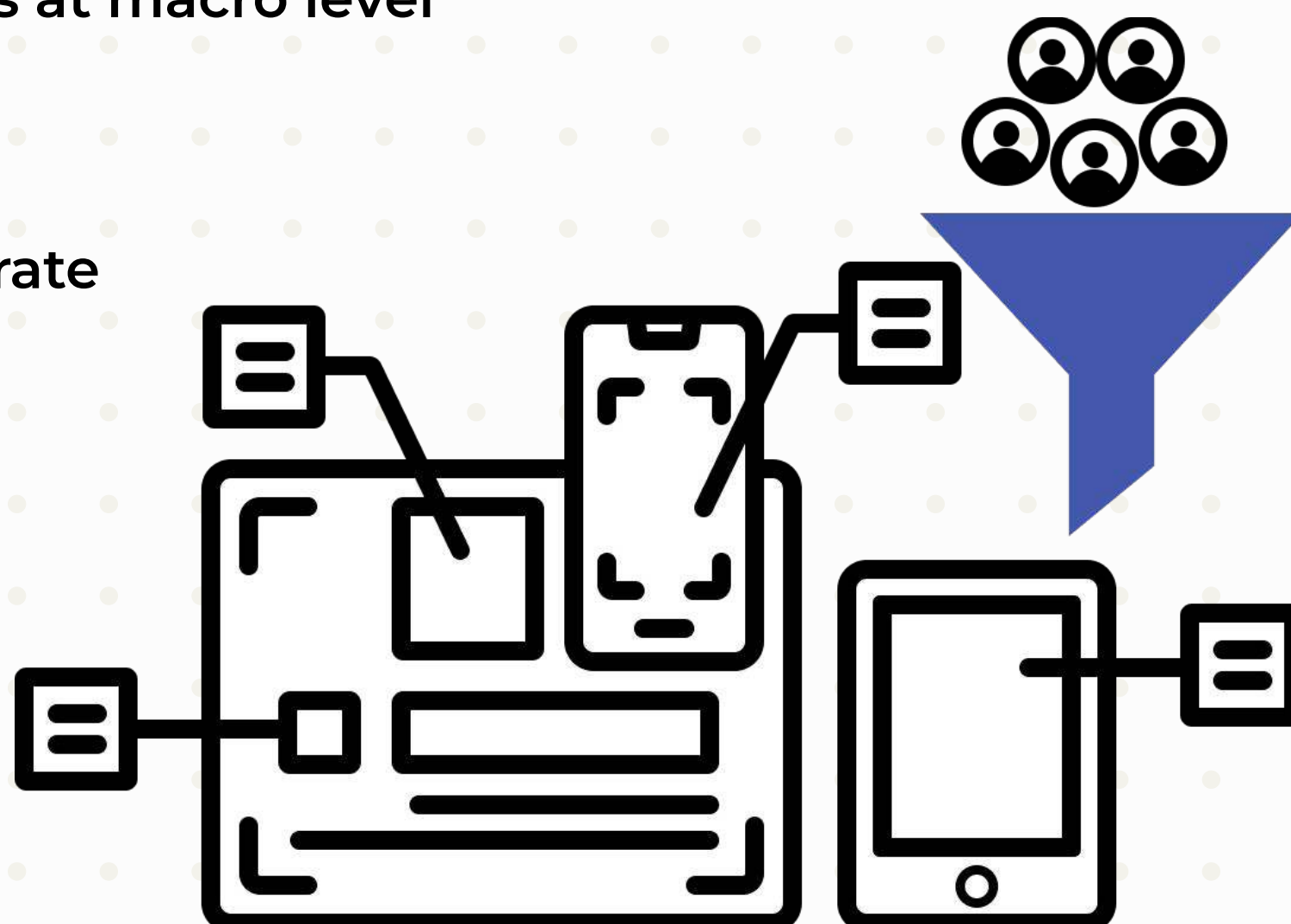
1- Define customer success

2- Map the product's milestones

3- Find the frictions at macro level

4- Clear the path

5- Measure and iterate

I'm here to help!

I offer a free **one-hour** comprehensive analysis of your product and am happy to assist you throughout the entire improvement process!

Contact me, let's talk!

craftedbybess.com

bess.eshraghi@gmail.com