

onboarding summit





The elements of a good onboarding flow



What is onboarding?

“ Improving the chances that users will be successful when adopting a product. ”

Samuel Hulick

Founder of UserOnboard



Continuous onboarding

- First contact of a person with the brand
- User registration
- Initial guidance
- User education
- Features adoption
- Support
- Etc.

Conscious onboarding

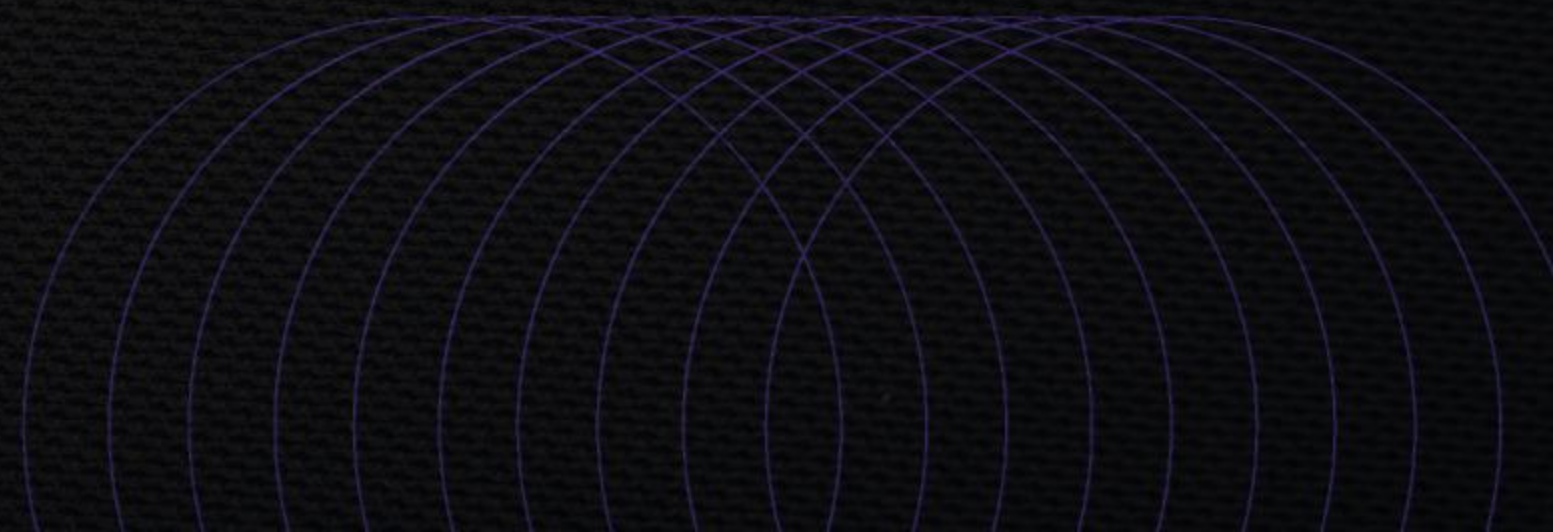
- Guide the users **wherever they go**
 - Help and encourage them to take key actions
 - Show the product value
- **Do not disrupt** the workflow
 - The learning pace is determined by the user
- Keep the cycle **moving**
 - The onboarding steps should be taken little by little



Onboarding goals

Focus on basic metrics:

conversion, adoption and retention



Conversion

- Turn users into customers
- Show the product value
- Reach the "Aha!" moment

Adoption

- User education
- Features adoption
- Solve secondary problems of the user
- In-app interaction

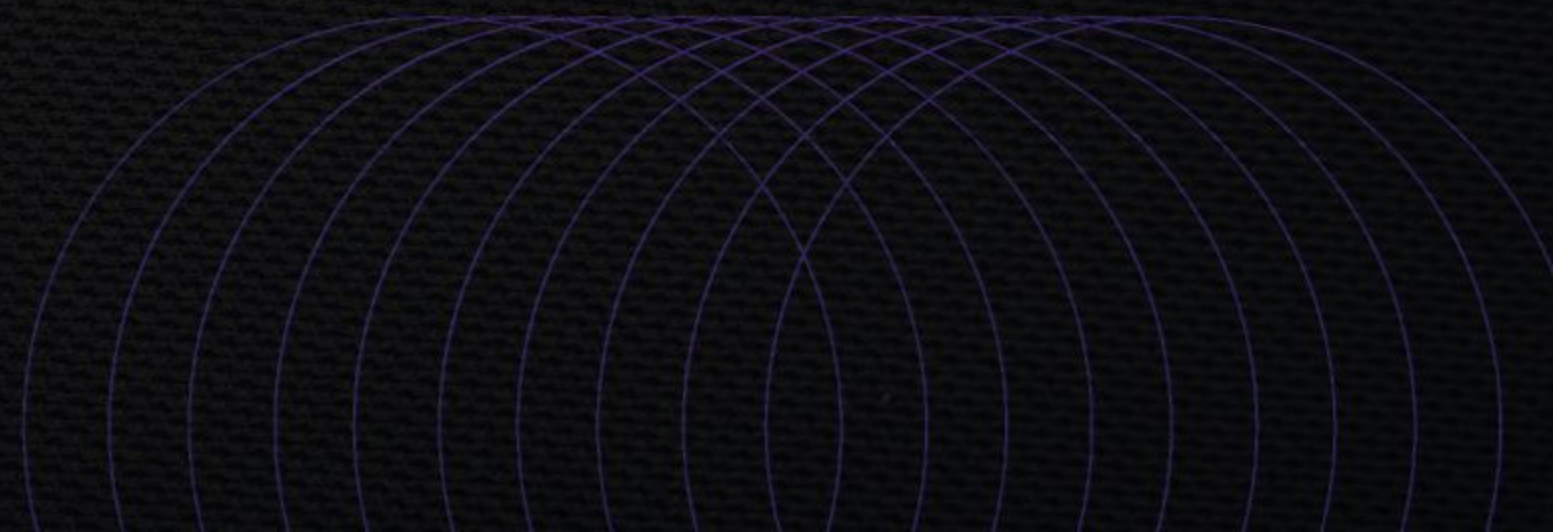
Retention

- Support and assistance
- Reinforce the product value
- Updates and new features



Product-driven

The user experience inside the product is
crucial



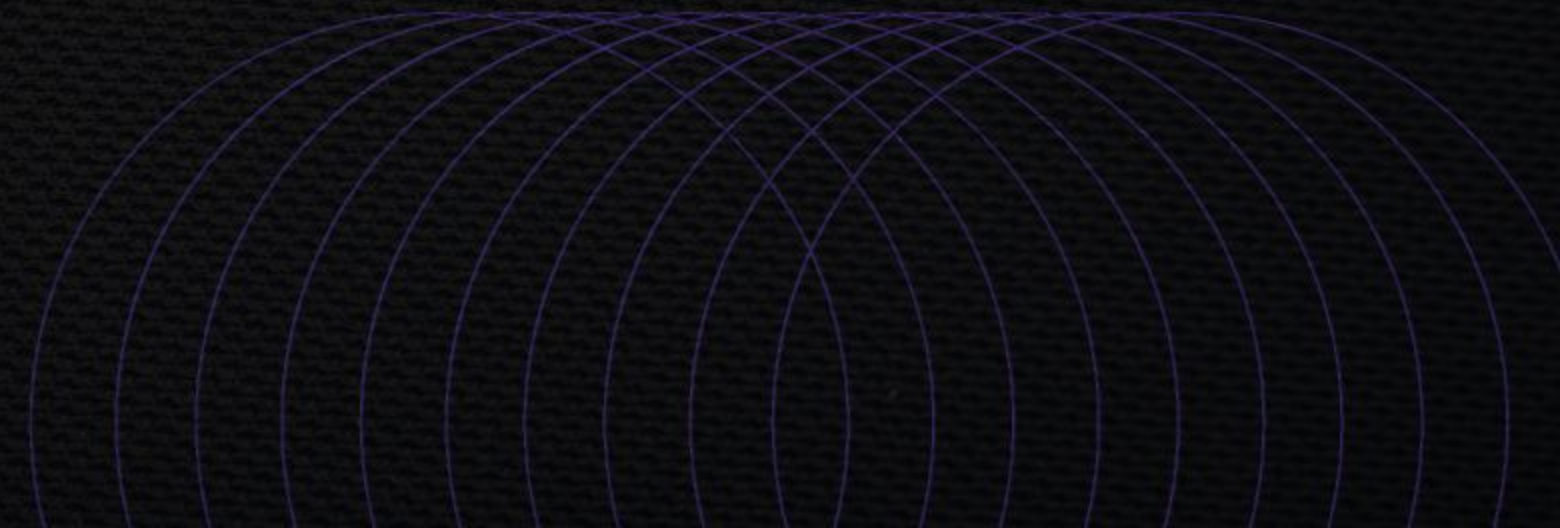
Product-Led Growth

Product-led growth is a growth strategy that primarily makes use of the product itself to acquire and retain users by essentially letting users access the product from the very start of their experience with your business.



Automation

Welcoming and guiding the users manually
is a thing of the past



Scalability

- Provide a better service with less resources
- Welcome and guide more users
- Handle common issues without consuming more resources
- Human service should be focused on
 - Specific issues
 - High-ticket customers

Segmentation

- Different user categories and contexts
 - Different onboarding flows
- Track the journey of each type of user

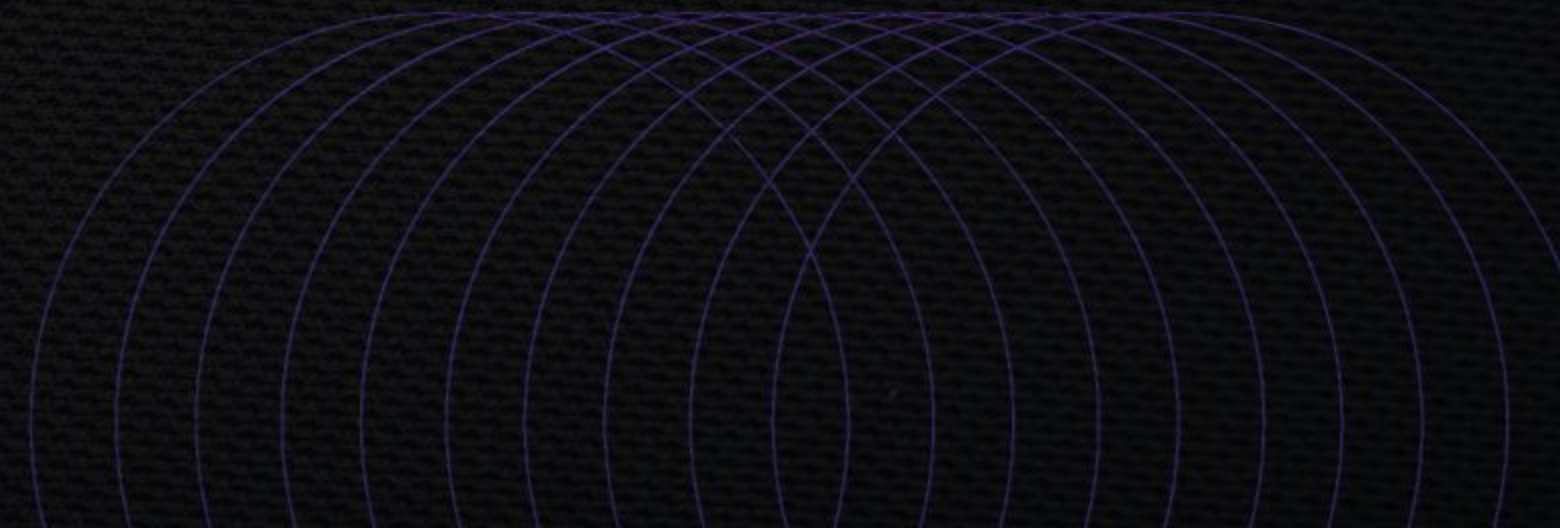
Maintenance

- Easy creation and maintenance of onboarding elements
- Less effort to update the onboarding flow
- Dynamic onboarding material
 - Use the product itself to guide the users
 - No need to update static elements, such as manuals and videos



Interactivity

A good onboarding flow is carried out by
interacting with the users



Integrated experience


- Customization
 - Integrate the onboarding flow with the product experience
 - Explicit, implicit and contextual customization
- Segmentation
 - Present different onboarding flows to different user categories
- Data analytics
 - Evaluate the onboarding flow based on the user behavior
 - Analyze view and completion rates
 - A/B testing

In-app elements

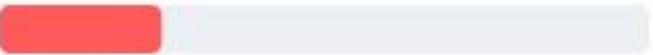
- Checklists and progress bars
- Resource center
- Guided tours, walkthroughs, and interactive guides
 - Modals
 - Tooltips
 - Hotspots
- Feedback collection
 - In-app surveys
 - NPS

Checklist


✕

Welcome to KeyHole! 

Start monitoring your brand like a pro

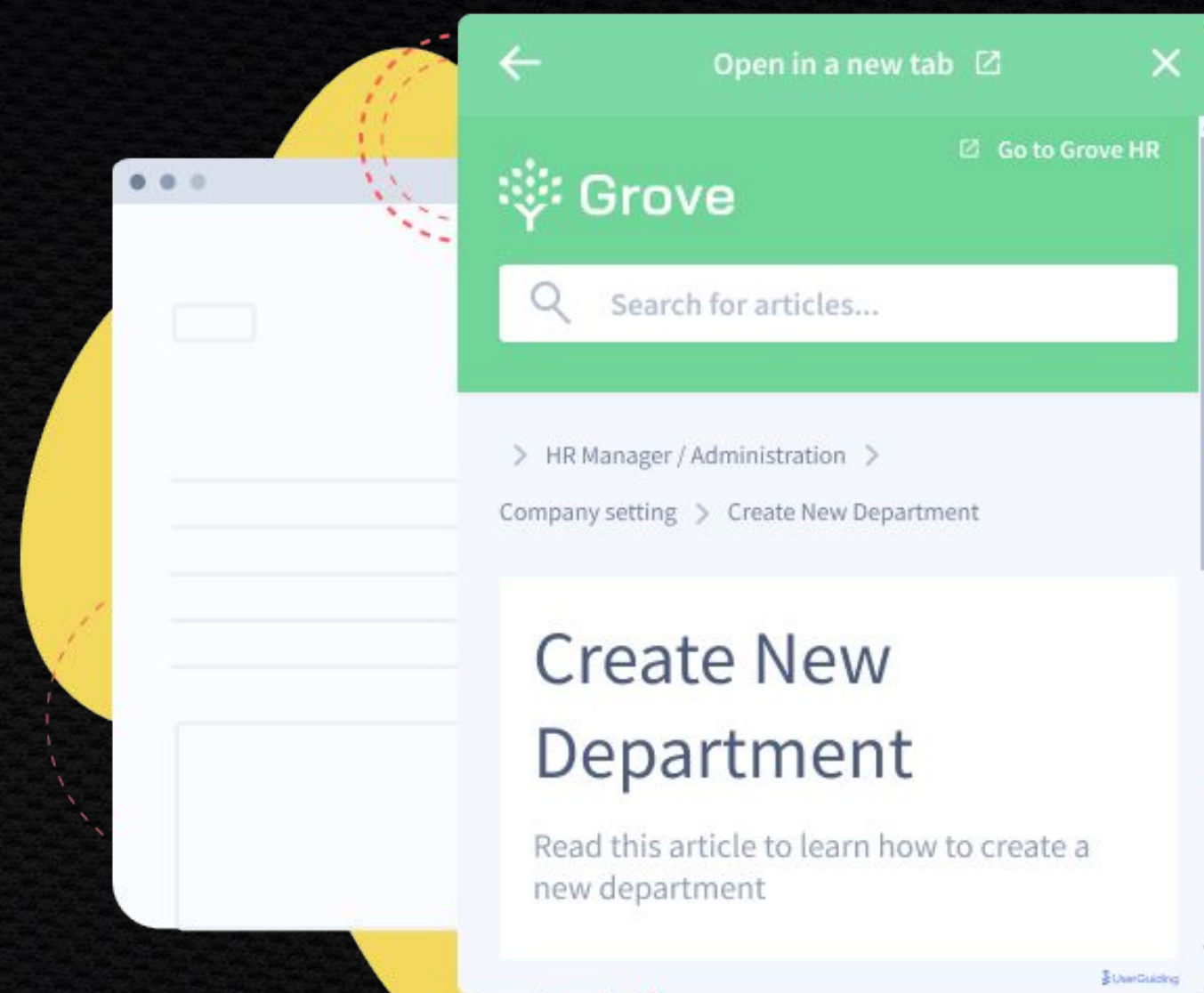
25% 

- Analyze your first Profile
- Add your remaining brand ...
- Compare and benchmark profiles
- Listen for mentions of your brand

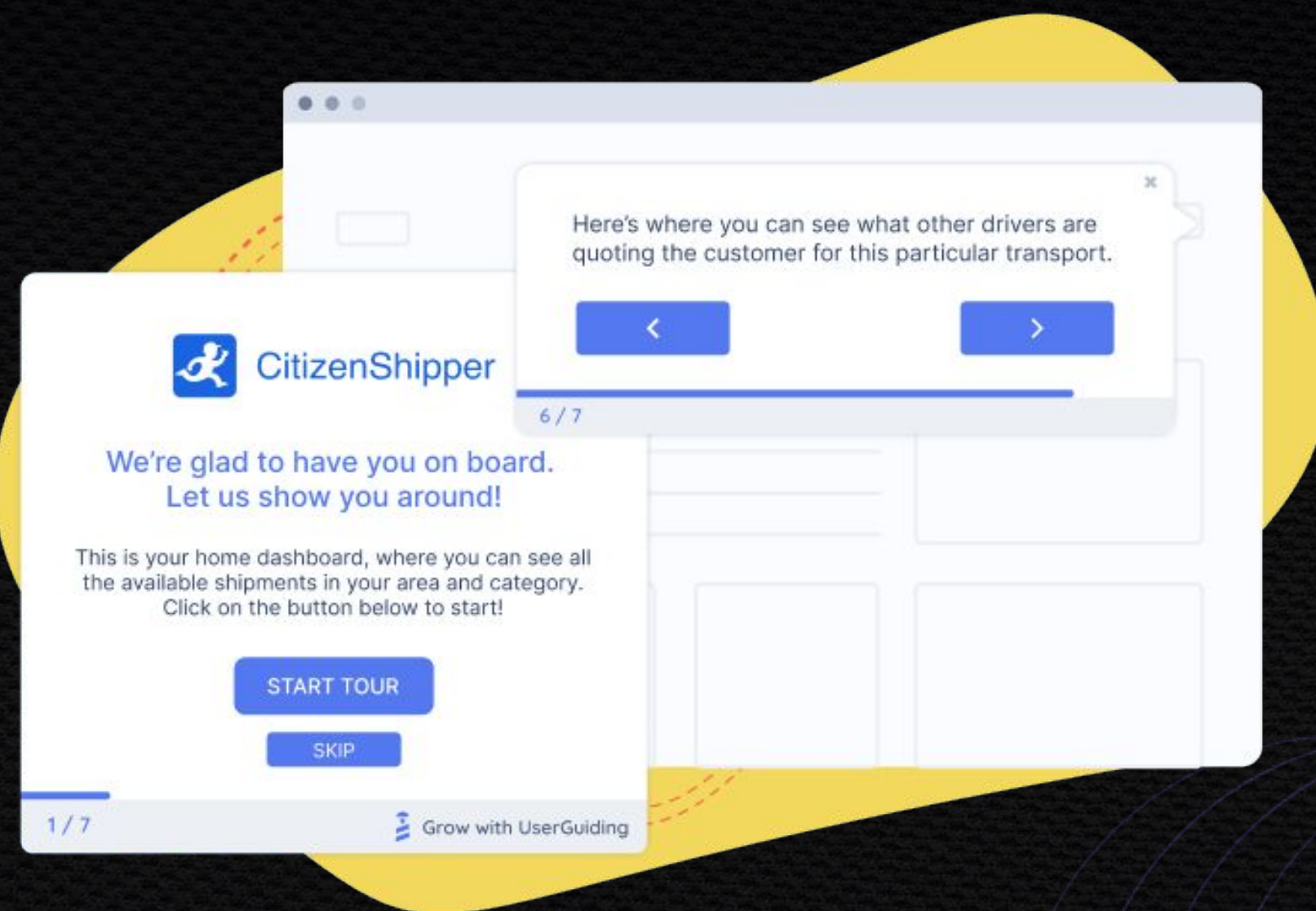
 Grow with UserGuiding

 Get Started ³

Resource center

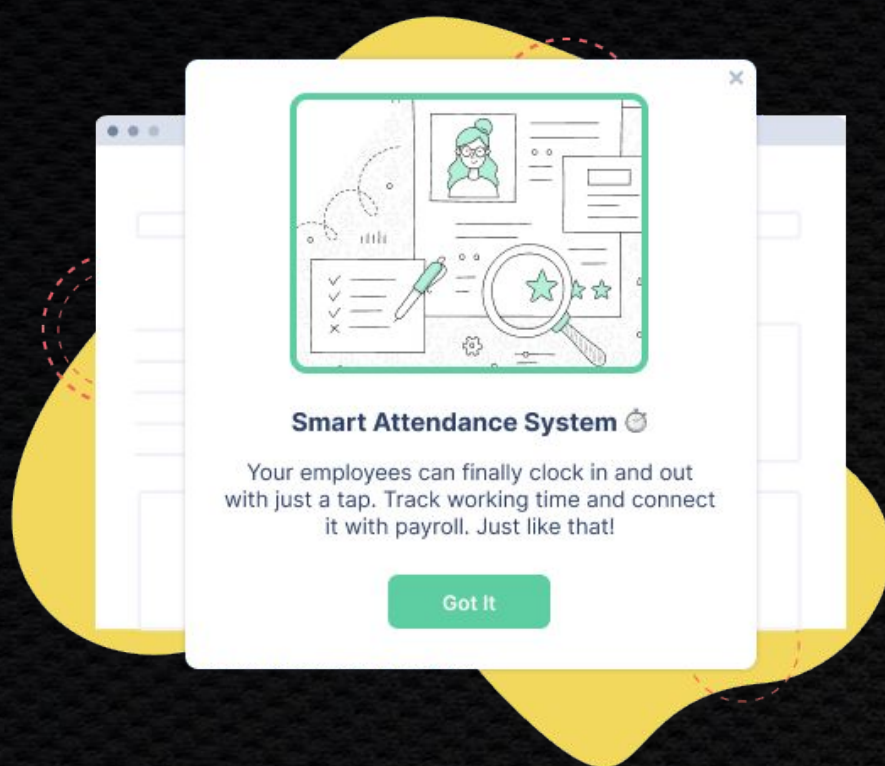


Guides & walkthroughs

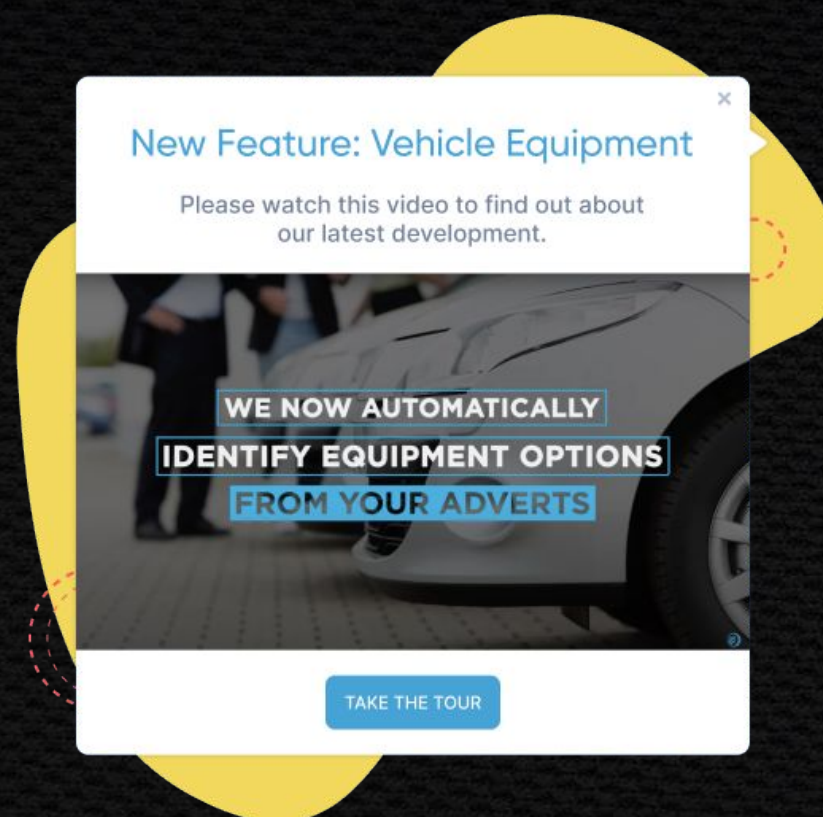


Guide elements

Modals



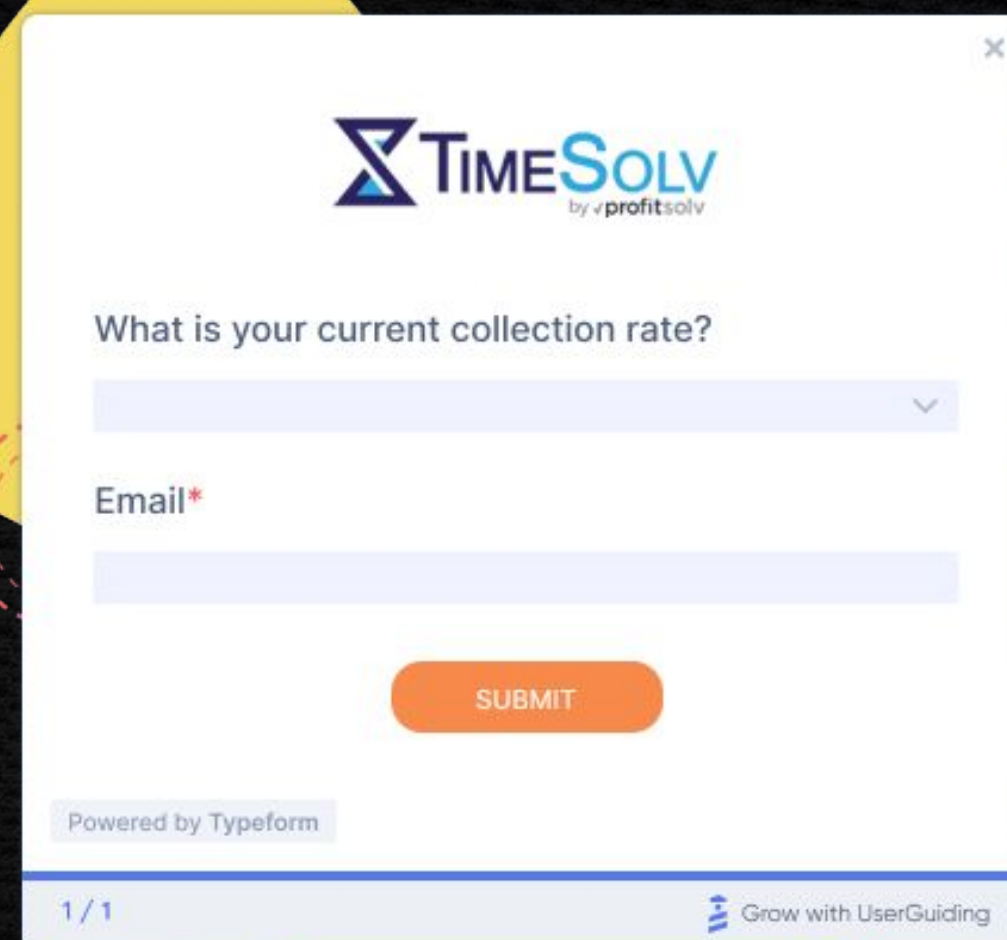
Tooltips




Hotspots



In-app surveys




 **TIME SOLV**
by vprofitsolv

What is your current collection rate?

Email*

SUBMIT

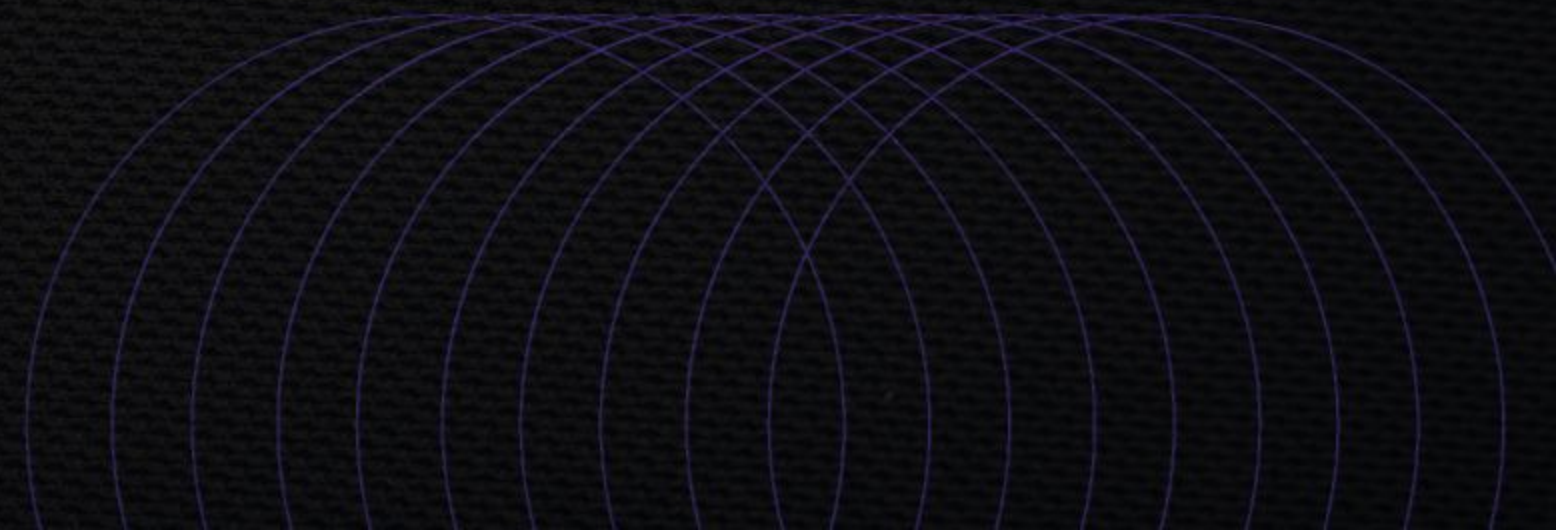
Powered by Typeform

1 / 1  Grow with UserGuiding

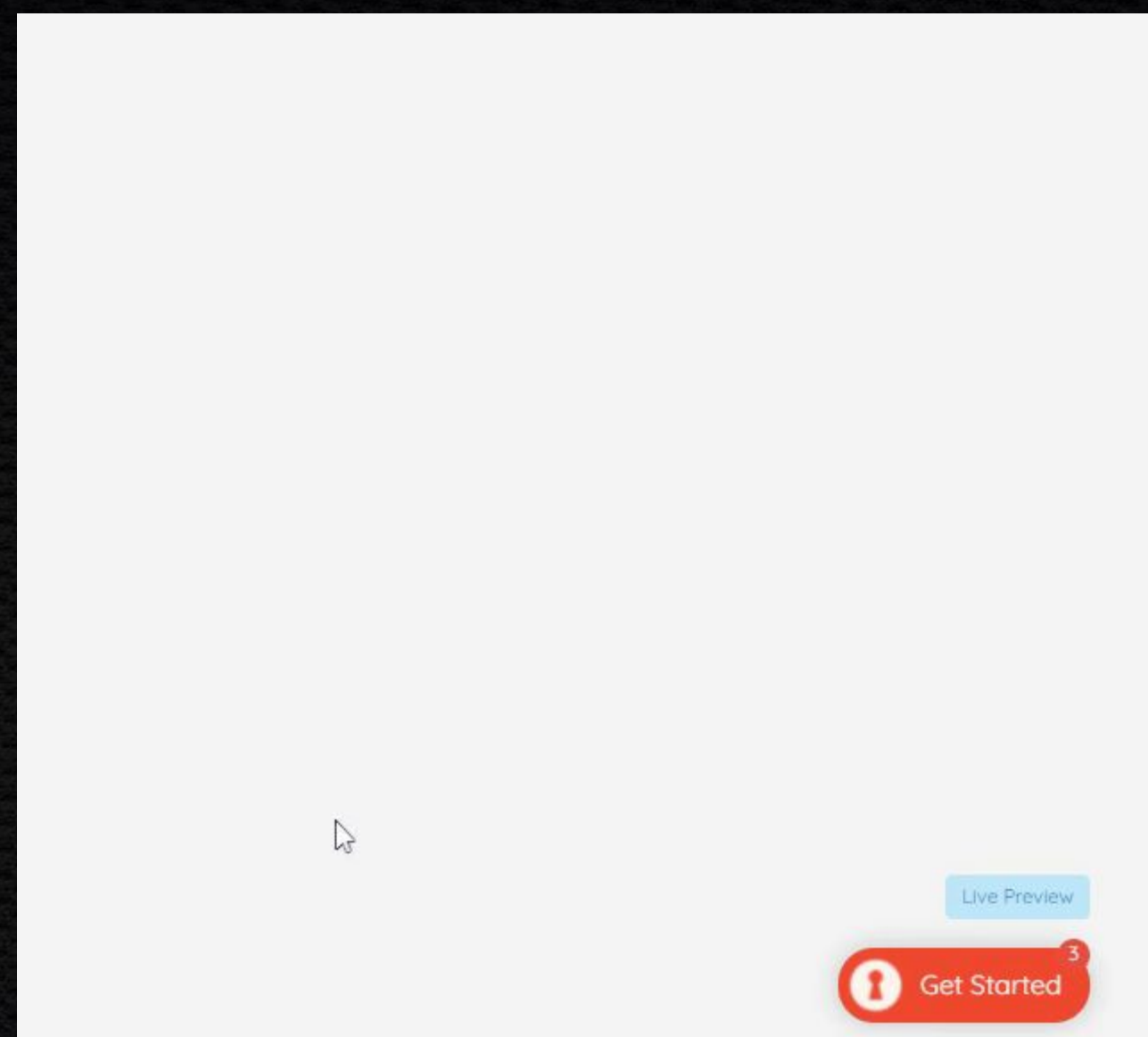


Examples

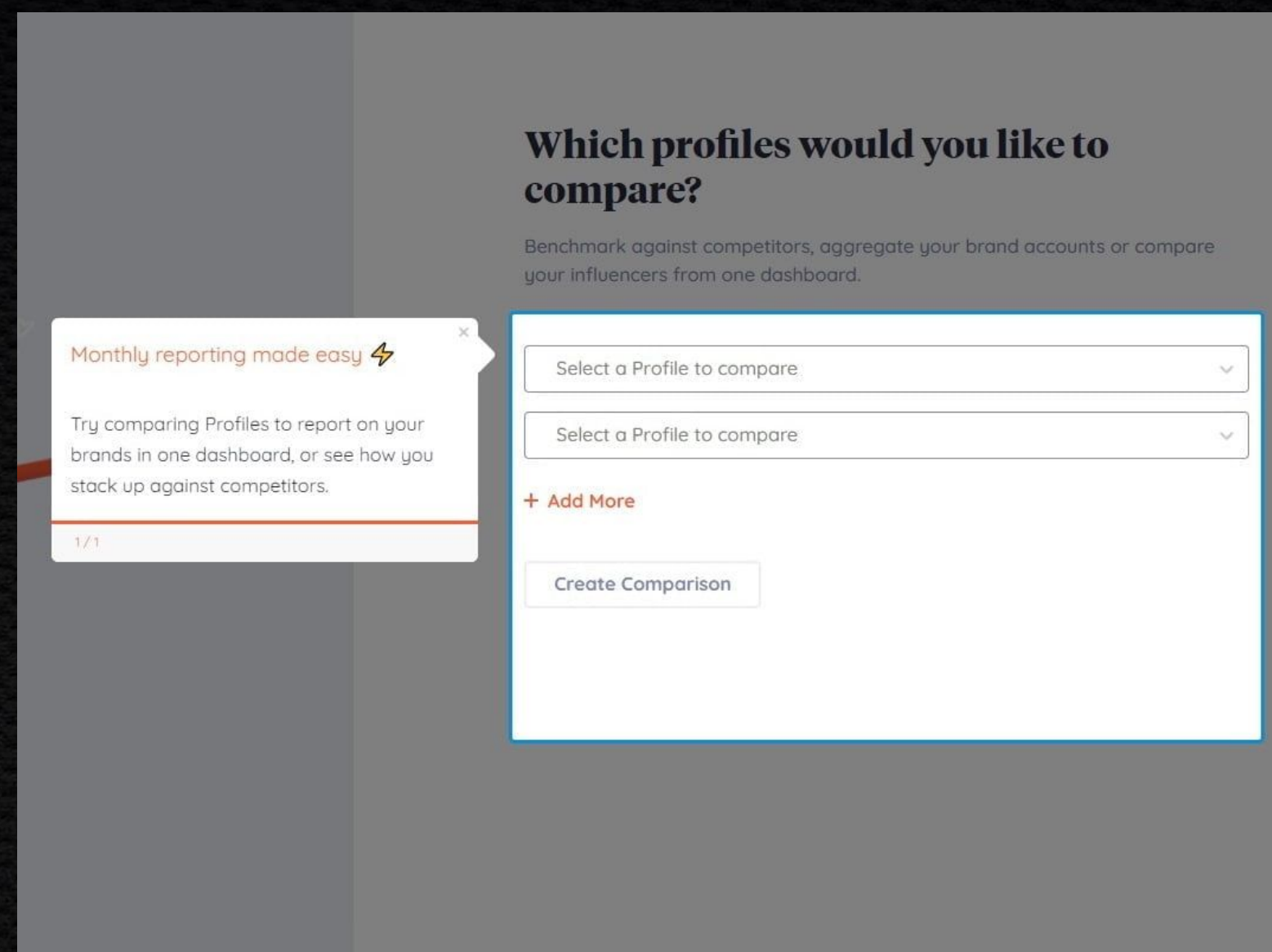
Real cases of
interactive onboarding flows



Case: Keyhole



Case: Keyhole



Which profiles would you like to compare?

Benchmark against competitors, aggregate your brand accounts or compare your influencers from one dashboard.

Monthly reporting made easy ⚡

Try comparing Profiles to report on your brands in one dashboard, or see how you stack up against competitors.

1/1

Select a Profile to compare

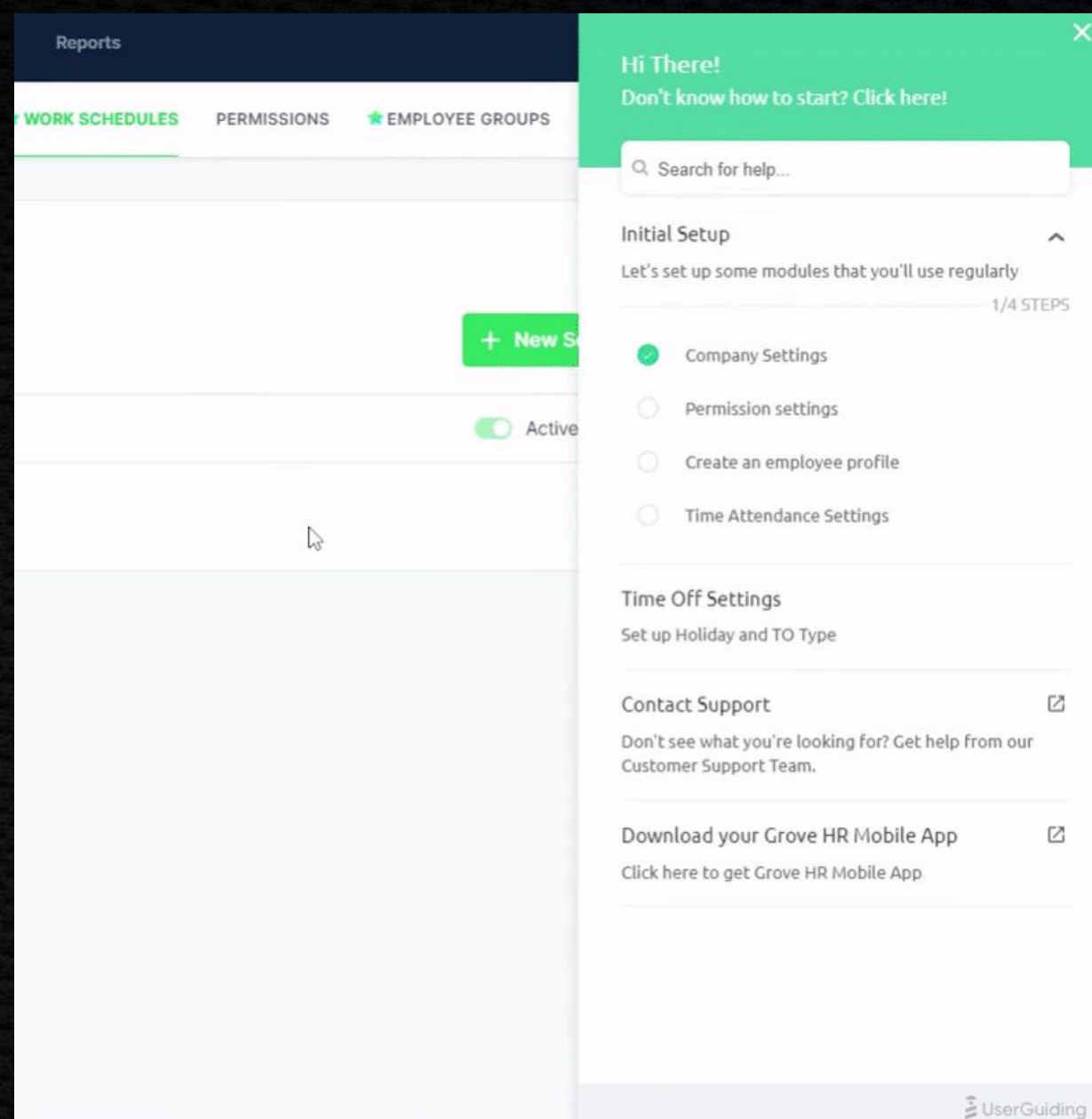
Select a Profile to compare

+ Add More

Create Comparison

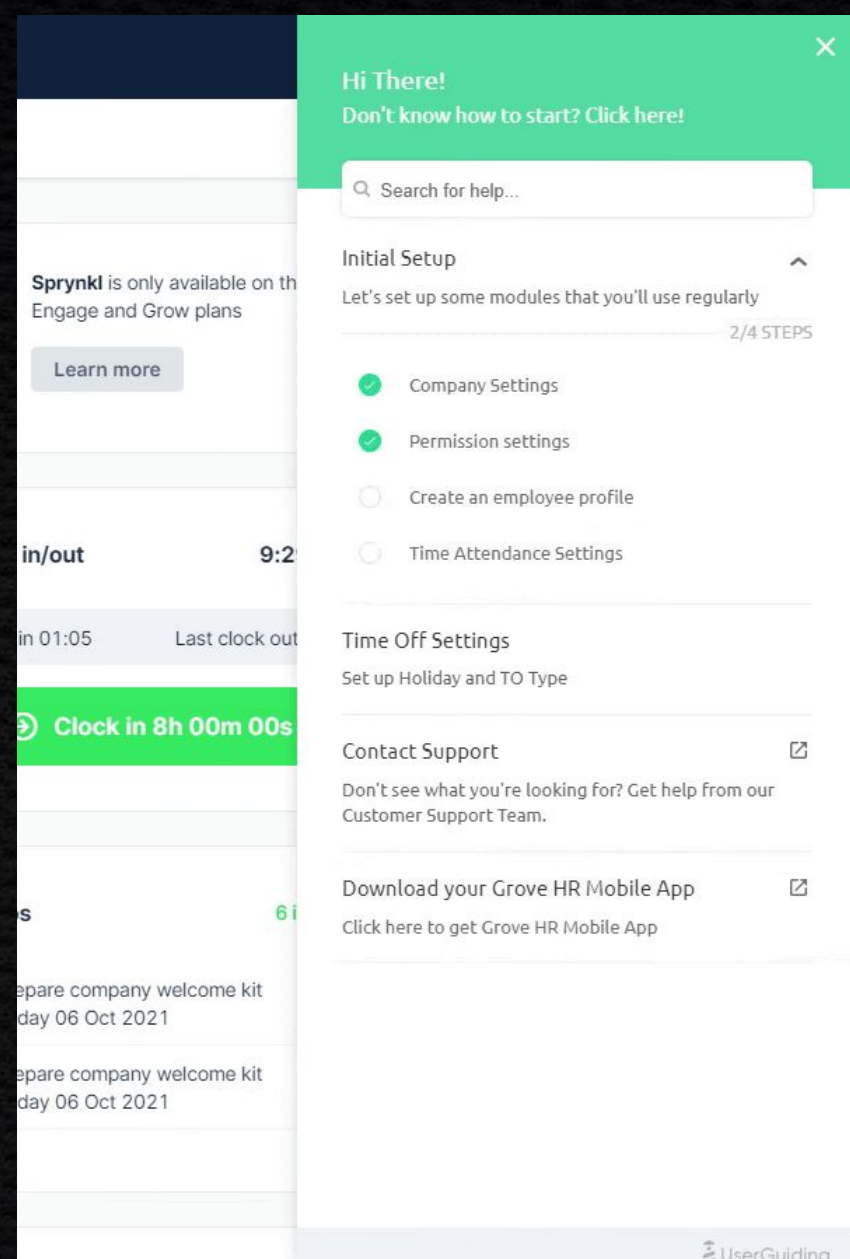
The screenshot shows a user interface for comparing profiles. It features a main heading 'Which profiles would you like to compare?' with a subtext explaining the purpose: 'Benchmark against competitors, aggregate your brand accounts or compare your influencers from one dashboard.' Below this are two dropdown menus, each labeled 'Select a Profile to compare', and a '+ Add More' link. A 'Create Comparison' button is at the bottom of the form. A tooltip on the left, titled 'Monthly reporting made easy ⚡', provides additional context: 'Try comparing Profiles to report on your brands in one dashboard, or see how you stack up against competitors.' The tooltip also shows '1/1' at the bottom.

Case: Grove HR

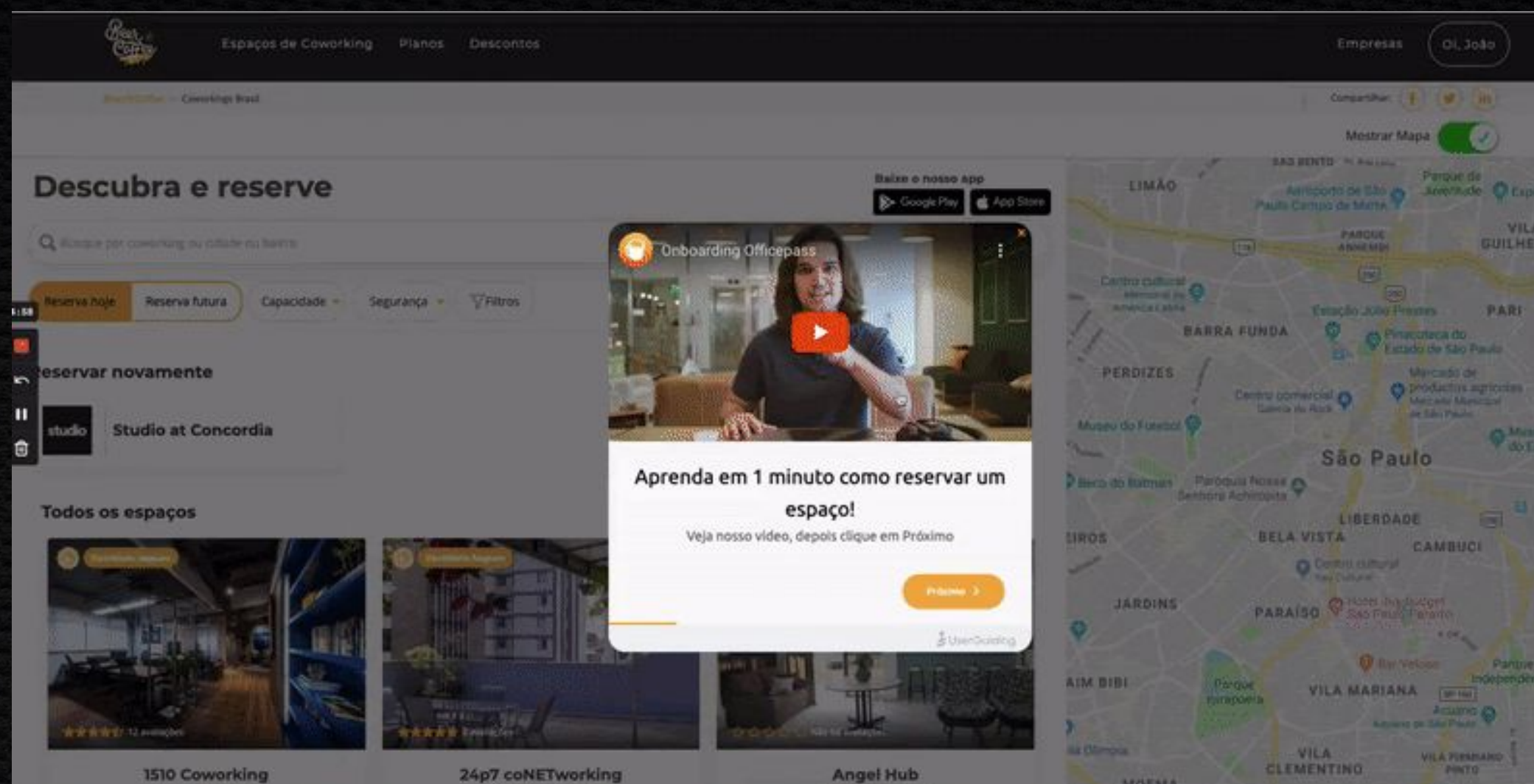


The screenshot displays the 'Reports' section of the Grove HR application. The main interface includes a navigation bar with 'WORK SCHEDULES', 'PERMISSIONS', and 'EMPLOYEE GROUPS'. A '+ New S' button and an 'Active' toggle are visible. A green 'Hi There!' onboarding overlay is positioned on the right, featuring a search bar and a list of setup steps: 'Initial Setup' (1/4 STEPS) with 'Company Settings' checked, 'Permission settings', 'Create an employee profile', and 'Time Attendance Settings'; 'Time Off Settings' (Set up Holiday and TO Type); 'Contact Support'; and 'Download your Grove HR Mobile App'. The UserGuiding logo is at the bottom right of the overlay.

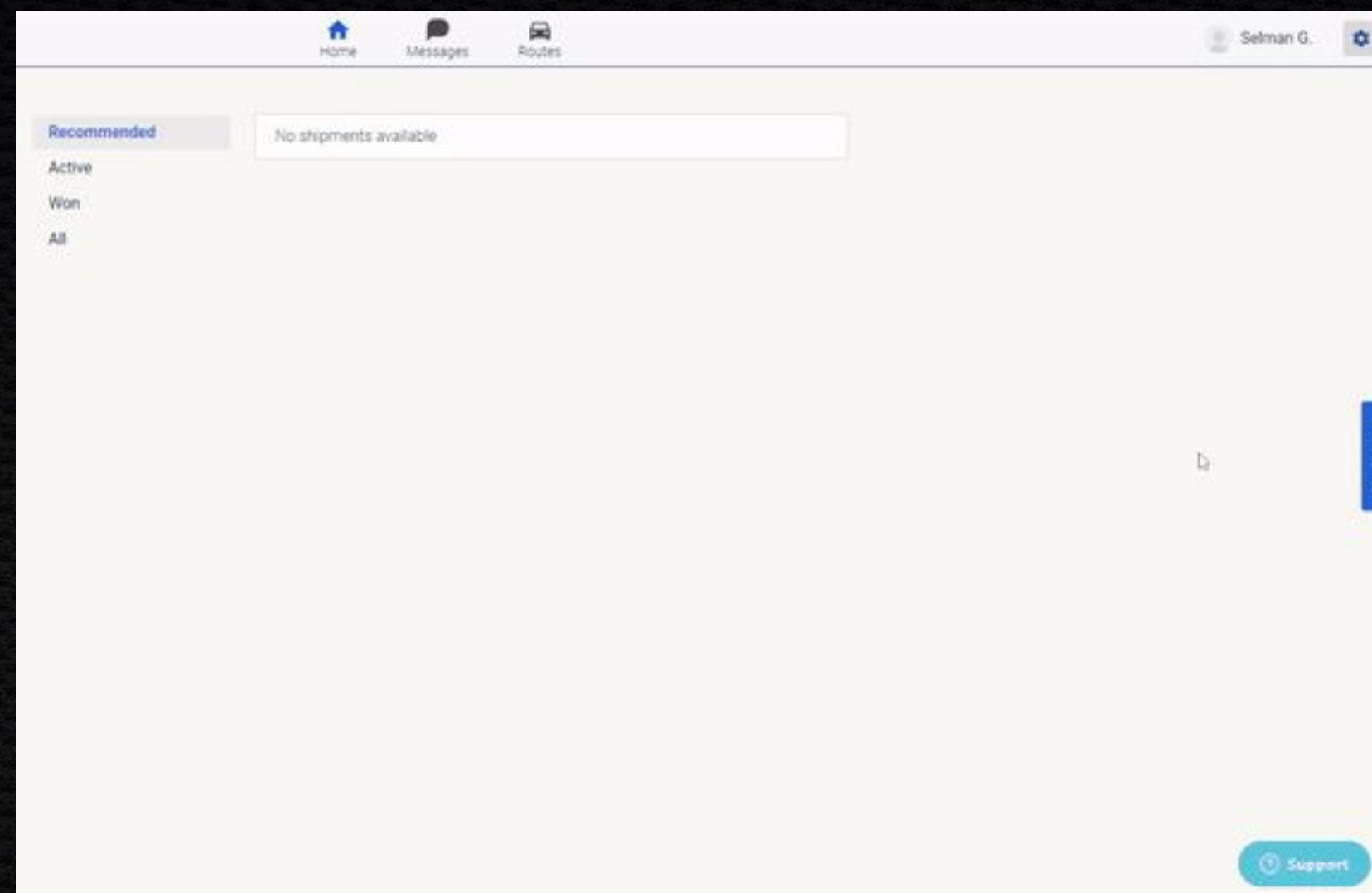
Case: Grove HR



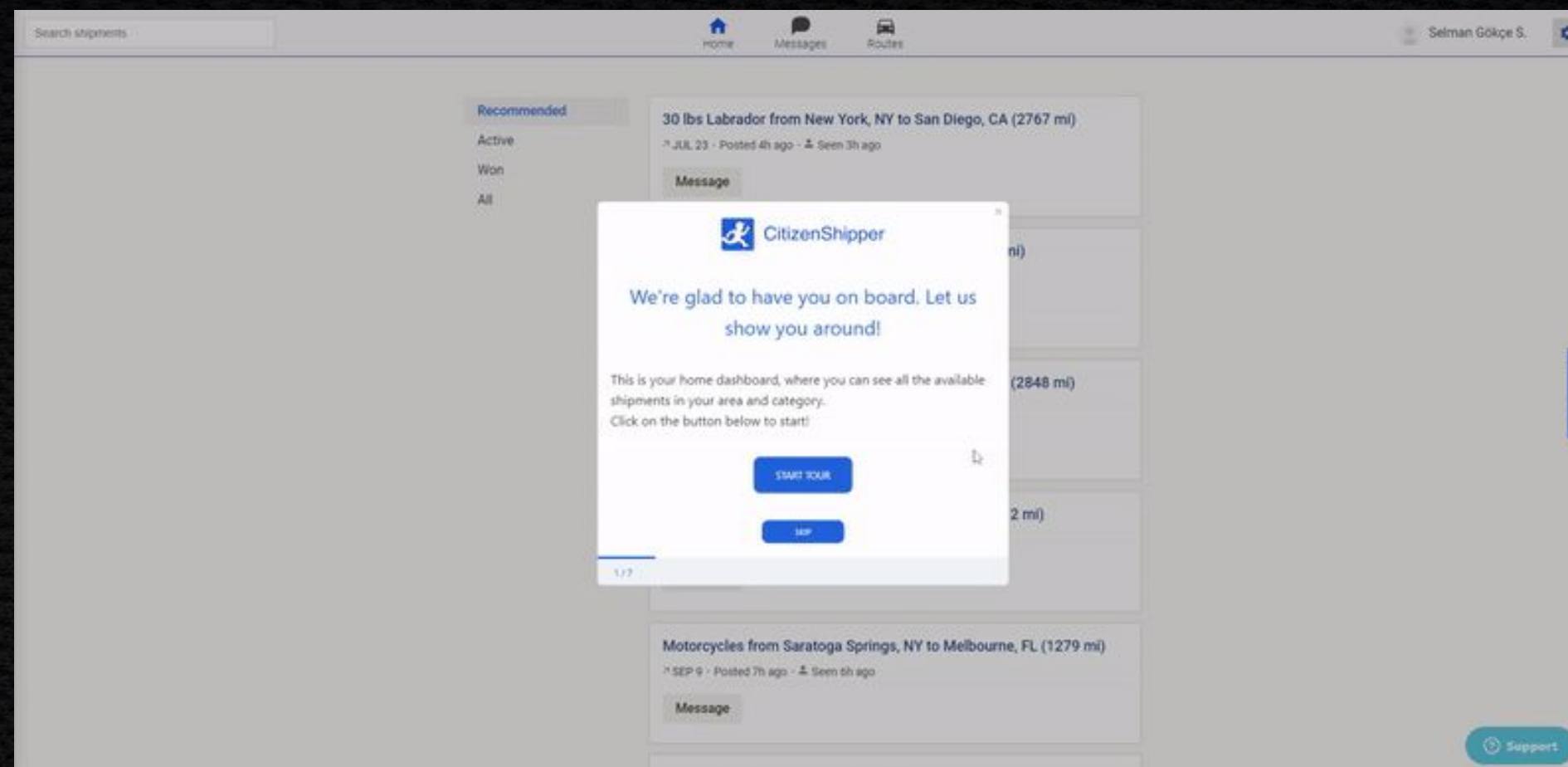
Case: BeerOrCoffee



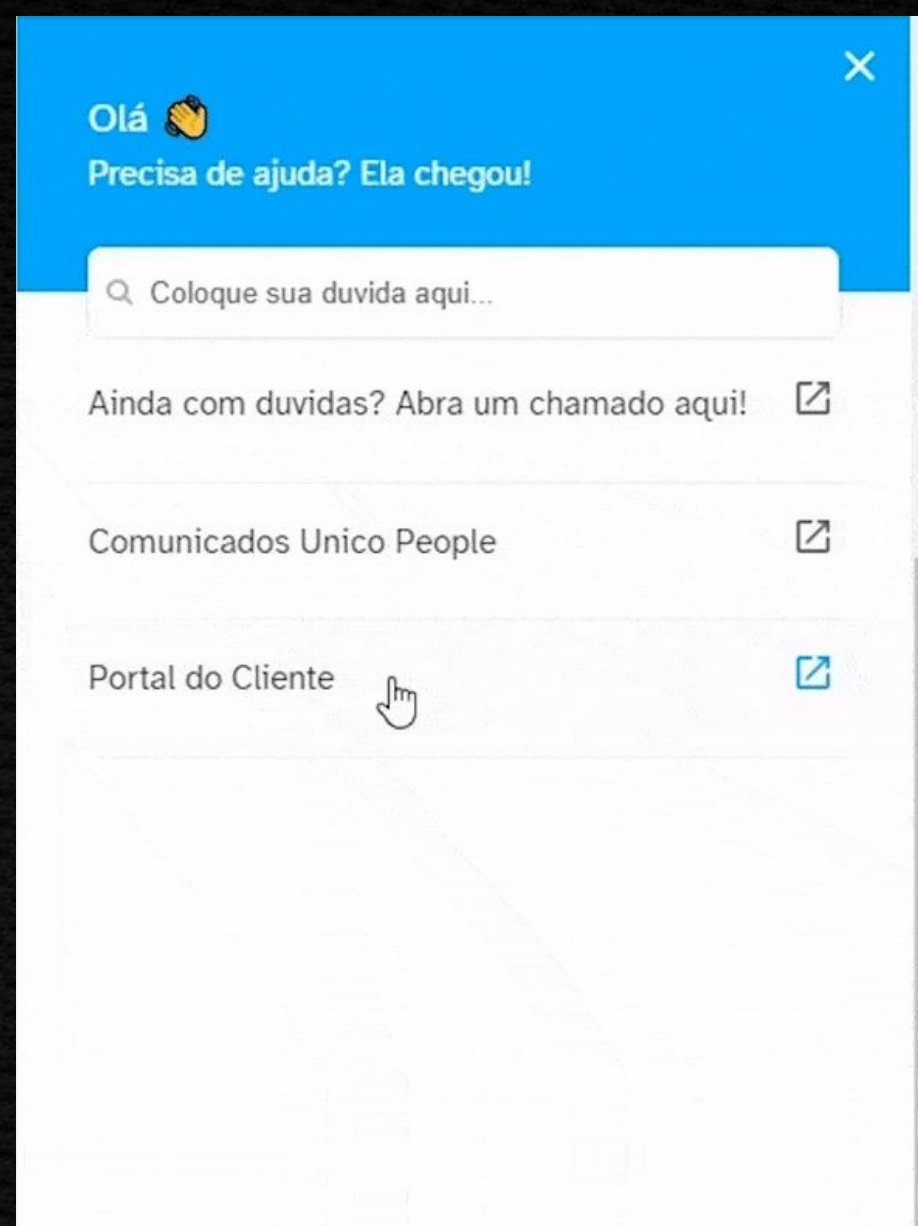
Case: Citizenshipper



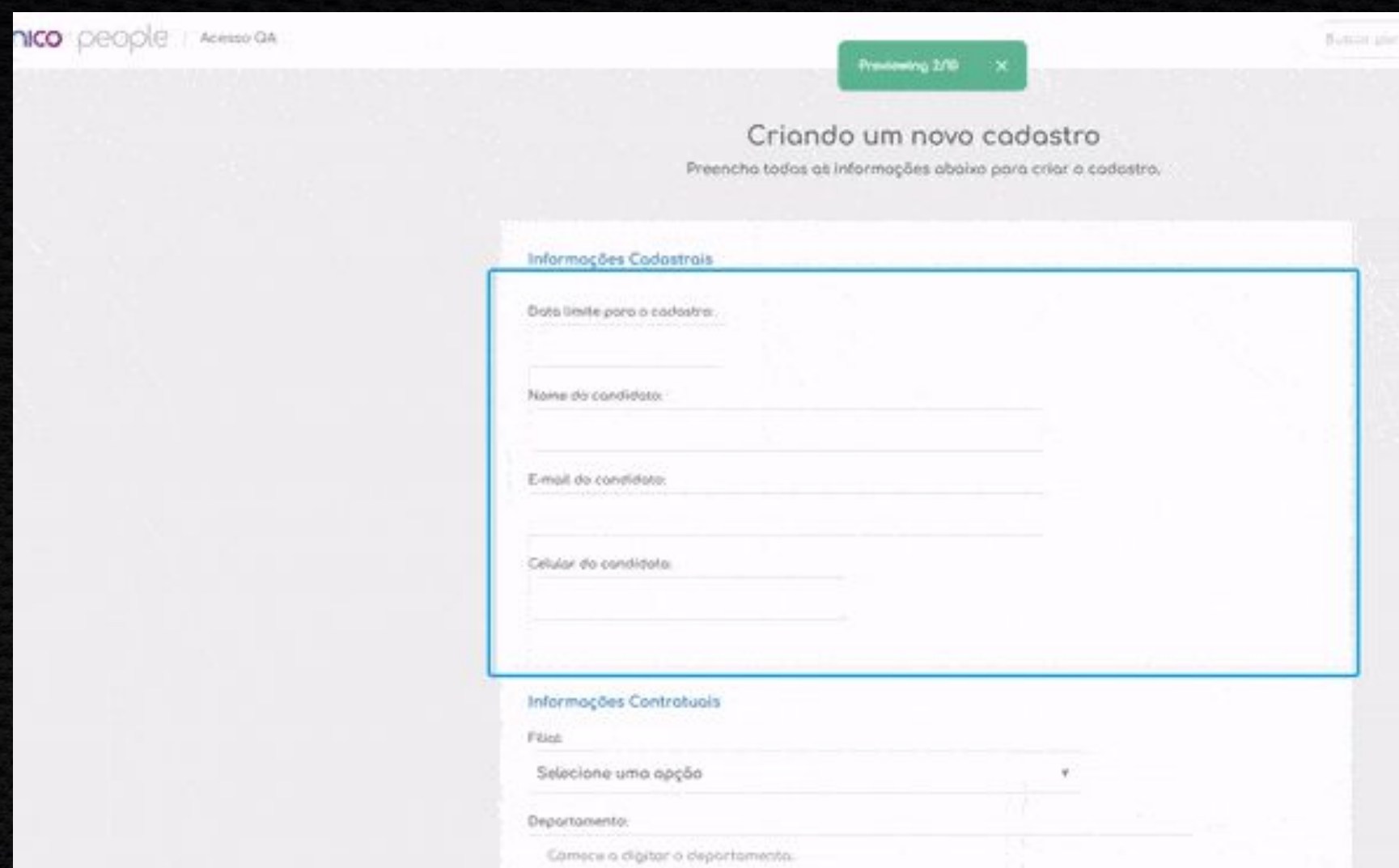
Case: CitizenShipper



Case: Unico

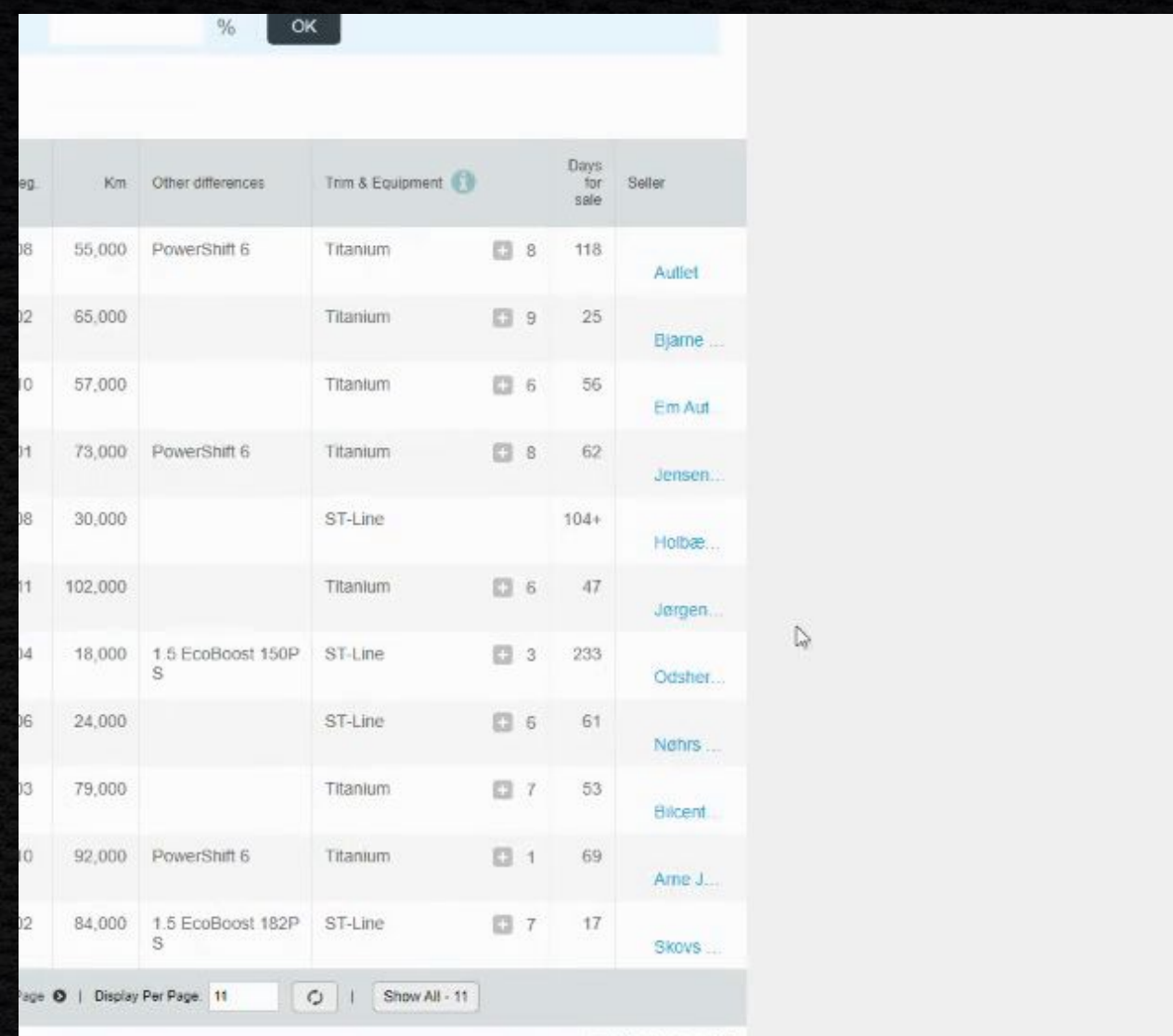


Case: Unico



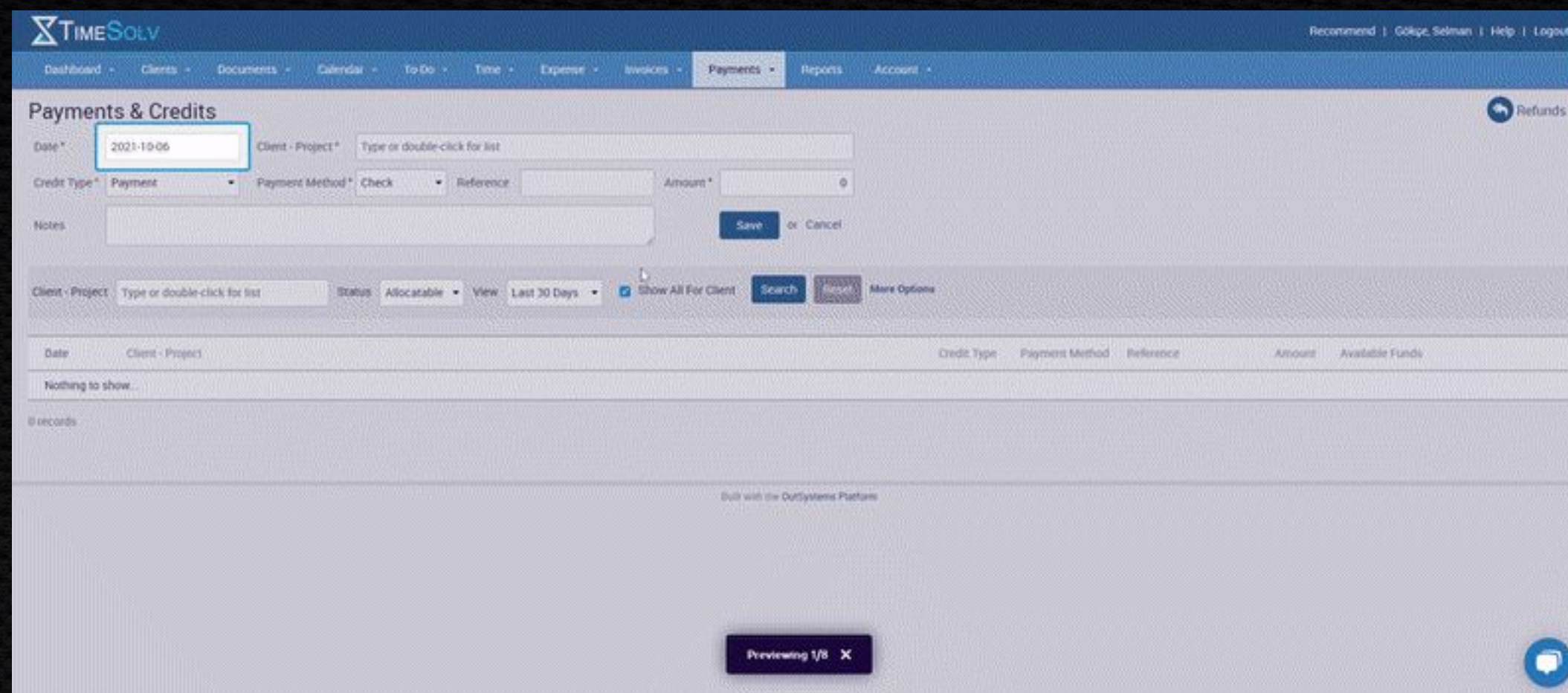
The screenshot shows a web form for creating a new registration. At the top left, it says "unico people / Acesso QA". In the top right, there is a green button labeled "Previewing 1/1" with a close icon. The main heading is "Criando um novo cadastro" with a sub-heading "Preencha todas as informações abaixo para criar o cadastro." The form is divided into two sections: "Informações Cadastrais" and "Informações Contratuais". The "Informações Cadastrais" section is highlighted with a blue border and contains four input fields: "Data limite para o cadastro:", "Nome do candidato:", "Email do candidato:", and "Celular do candidato:". The "Informações Contratuais" section contains a "Fluxo:" dropdown menu with the text "Selecione uma opção" and a "Departamento:" input field with the placeholder text "Comece a digitar o departamento."

Case: Indicata



Reg	Km	Other differences	Trim & Equipment	Days for sale	Seller	
08	55,000	PowerShift 6	Titanium	8	118	Auliel
02	65,000		Titanium	9	25	Ejarné ...
00	57,000		Titanium	6	56	Em Aut
01	73,000	PowerShift 6	Titanium	8	62	Jensen...
08	30,000		ST-Line		104+	Holbæ...
01	102,000		Titanium	6	47	Jørgen...
04	18,000	1.5 EcoBoost 150P S	ST-Line	3	233	Odsher...
06	24,000		ST-Line	6	61	Nehrs ...
03	79,000		Titanium	7	53	Blacent ...
00	92,000	PowerShift 6	Titanium	1	69	Arne J...
02	84,000	1.5 EcoBoost 182P S	ST-Line	7	17	Skovs ...

Case: TimeSolv



TIME SOLV Recommend | Gökçe Selman | Help | Logout

Dashboard - Clients - Documents - Calendar - To-Do - Time - Expense - Invoices - **Payments** - Reports - Account

Payments & Credits Refunds

Date* Client - Project*

Credit Type* Payment Method* Reference Amount*

Notes

or

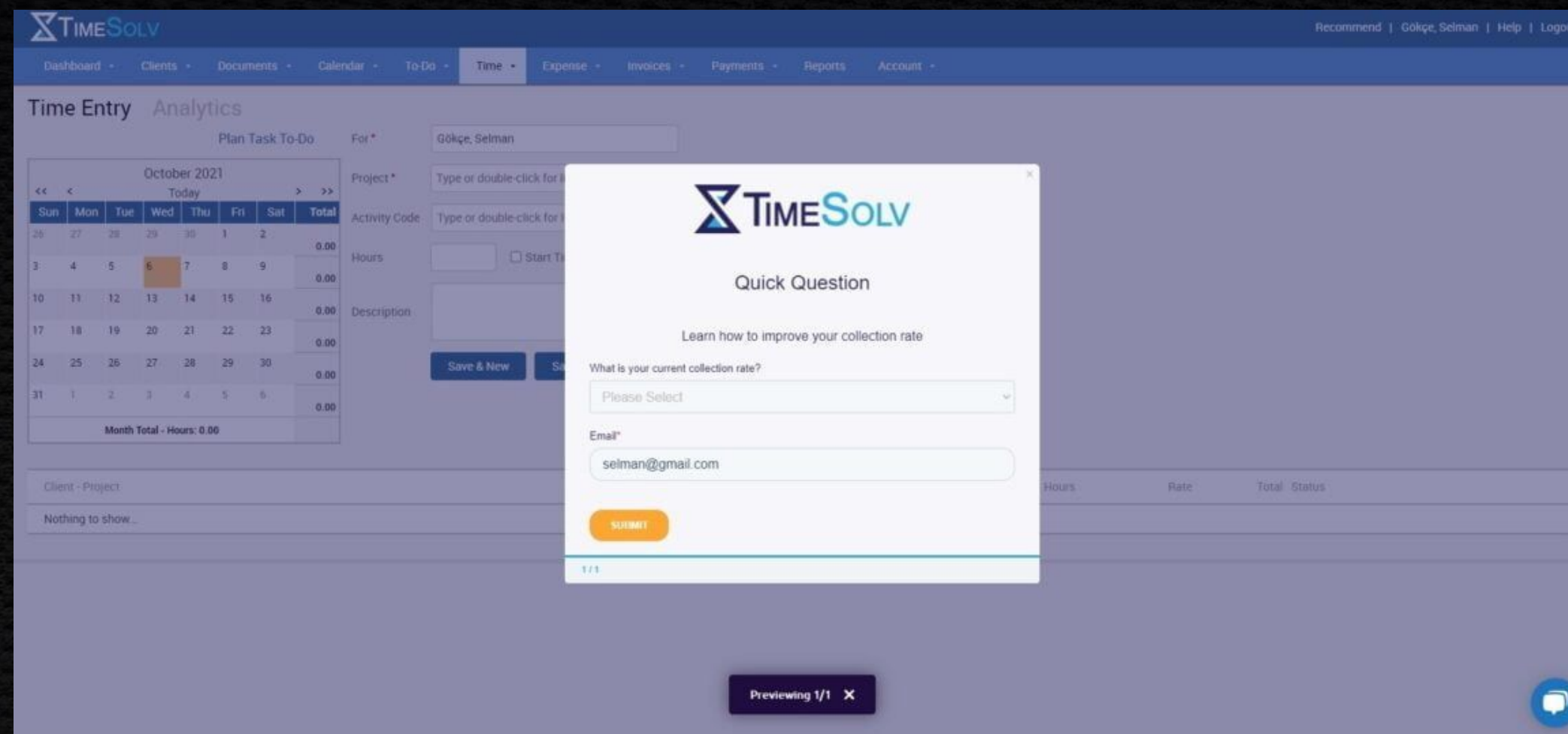
Client - Project Status View Show All For Client

Date	Client - Project	Credit Type	Payment Method	Reference	Amount	Available Funds
Nothing to show...						

0 records

Built with the OutSystems Platform

Case: TimeSolv



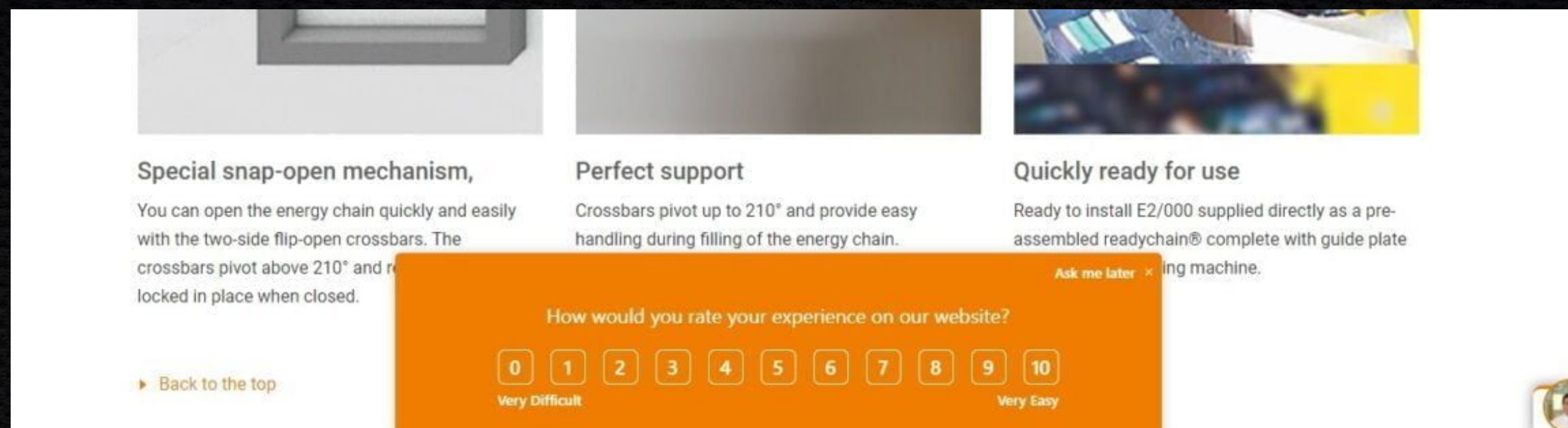
The screenshot displays the TimeSolv web application interface. The top navigation bar includes the TimeSolv logo and user information: "Recommend | Gökçe Selman | Help | Logout". The main menu contains "Dashboard", "Clients", "Documents", "Calendar", "To-Do", "Time", "Expense", "Invoices", "Payments", "Reports", and "Account".

The "Time Entry" section is active, showing a calendar for October 2021. The calendar table is as follows:

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
25	27	28	29	30	1	2	0.00
3	4	5	6	7	8	9	0.00
10	11	12	13	14	15	16	0.00
17	18	19	20	21	22	23	0.00
24	25	26	27	28	29	30	0.00
31	1	2	3	4	5	6	0.00
Month Total - Hours: 0.00							

Below the calendar, there are input fields for "For*", "Project*", "Activity Code", "Hours", and "Description". A "Save & New" button is visible. A modal dialog titled "Quick Question" is overlaid on the screen, asking "What is your current collection rate?" with a dropdown menu showing "Please Select" and an email field containing "selman@gmail.com". A "SUBMIT" button is at the bottom of the modal. At the bottom of the page, there is a "Previewing 1/1" notification and a chat icon.

Case: Igus



The screenshot displays three columns of product features on the Igus website. Each column has a small image at the top and a text block below. The first column is titled 'Special snap-open mechanism,' and describes a two-side flip-open crossbar mechanism. The second is titled 'Perfect support' and describes crossbars that pivot up to 210 degrees. The third is titled 'Quickly ready for use' and describes a pre-assembled readychain® with a guide plate. An orange survey overlay is positioned in the foreground, asking 'How would you rate your experience on our website?' with a scale from 0 (Very Difficult) to 10 (Very Easy). A 'Back to the top' link is visible in the bottom left of the page content, and an 'Ask me later' button is in the top right of the survey overlay.

Special snap-open mechanism,
You can open the energy chain quickly and easily with the two-side flip-open crossbars. The crossbars pivot above 210° and are locked in place when closed.

Perfect support
Crossbars pivot up to 210° and provide easy handling during filling of the energy chain.

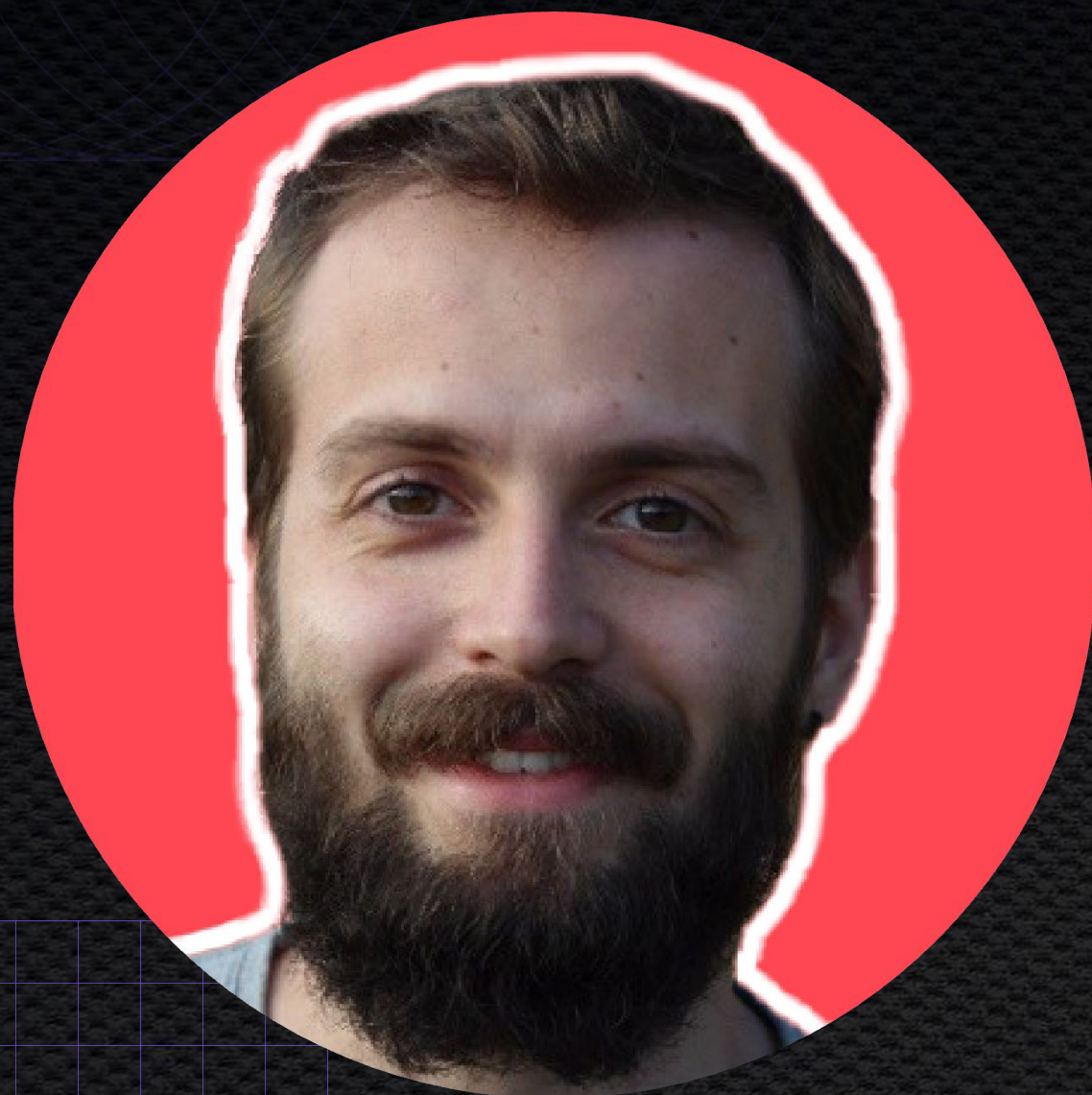
Quickly ready for use
Ready to install E2/000 supplied directly as a pre-assembled readychain® complete with guide plate for the filling machine.

► [Back to the top](#)

How would you rate your experience on our website?

0 1 2 3 4 5 6 7 8 9 10
Very Difficult Very Easy

Ask me later ×



Thank you!

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