


onboarding summit





Os elementos de um bom fluxo de onboarding



O que é onboarding?

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

Samuel Hulick

Fundador da UserOnboard



Onboarding contínuo

- Primeiro contato do usuário com a marca
- Cadastro do usuário
- Orientação inicial
- Educação do usuário
- Adoção de recursos
- Suporte
- Etc.

Onboarding consciente

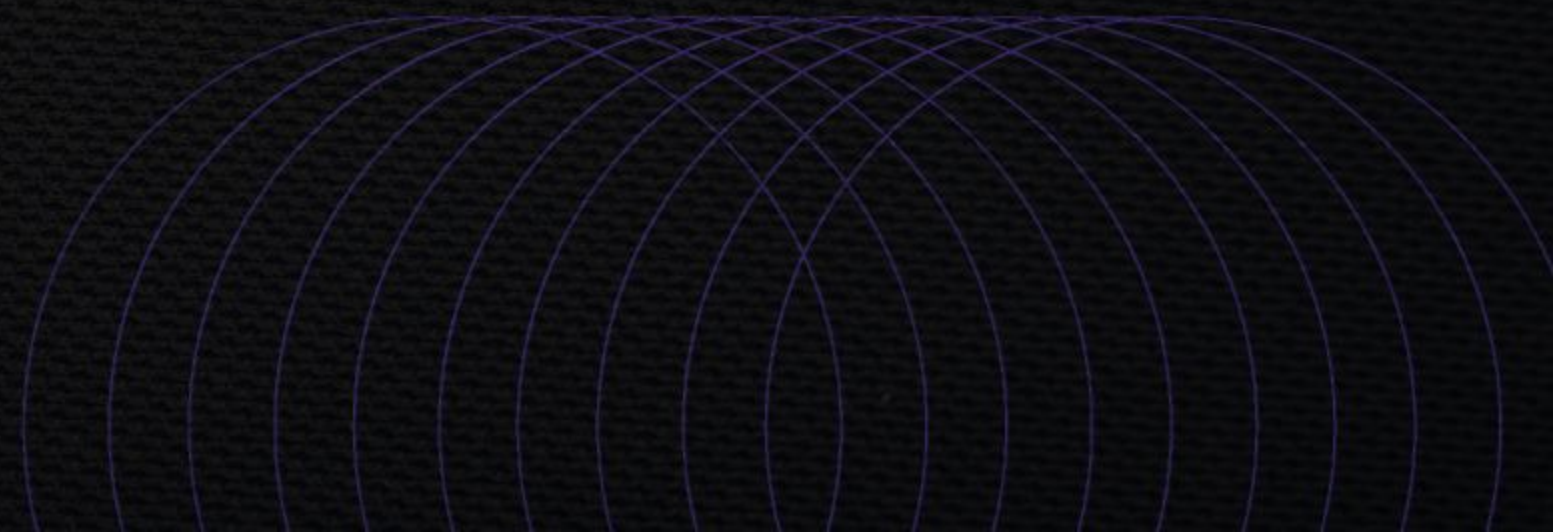
- Conduzir os usuários **onde eles estiverem**
 - Ajudá-los e incentivá-los a realizar tarefas importantes
 - Mostrar o valor do produto
- **Não interromper** o fluxo de trabalho
 - O ritmo de aprendizado é determinado pelo usuário
- Manter o ciclo **em movimento**
 - As etapas do onboarding são apresentadas aos poucos



Objetivos do onboarding

Foco em três métricas básicas:

conversão, adoção e retenção



Conversão

- Transformar usuários em clientes
- Apresentar o valor do produto
- Alcançar o momento "Aha!"

Adoção

- Educação do usuário
- Adoção de recursos
- Resolução de problemas secundários
- Interação in-app

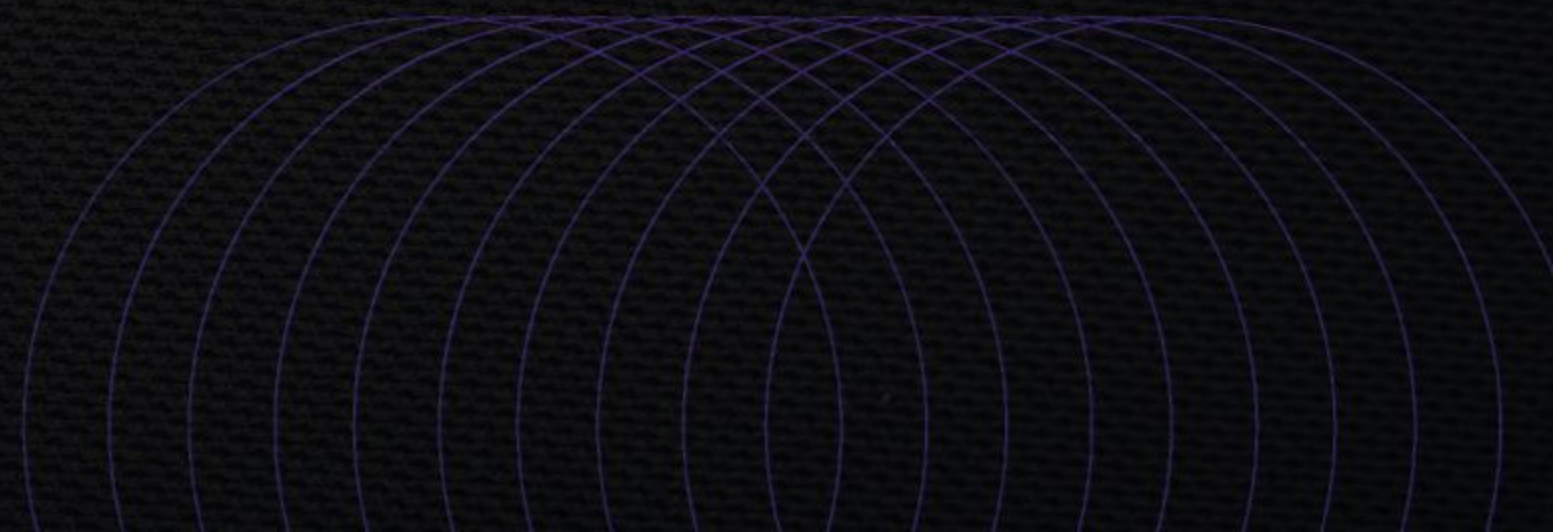
Retenção

- Assistência e suporte
- Reforço do valor do produto
- Atualizações e novos recursos



Orientado pelo produto

A experiência do usuário no produto é
fundamental



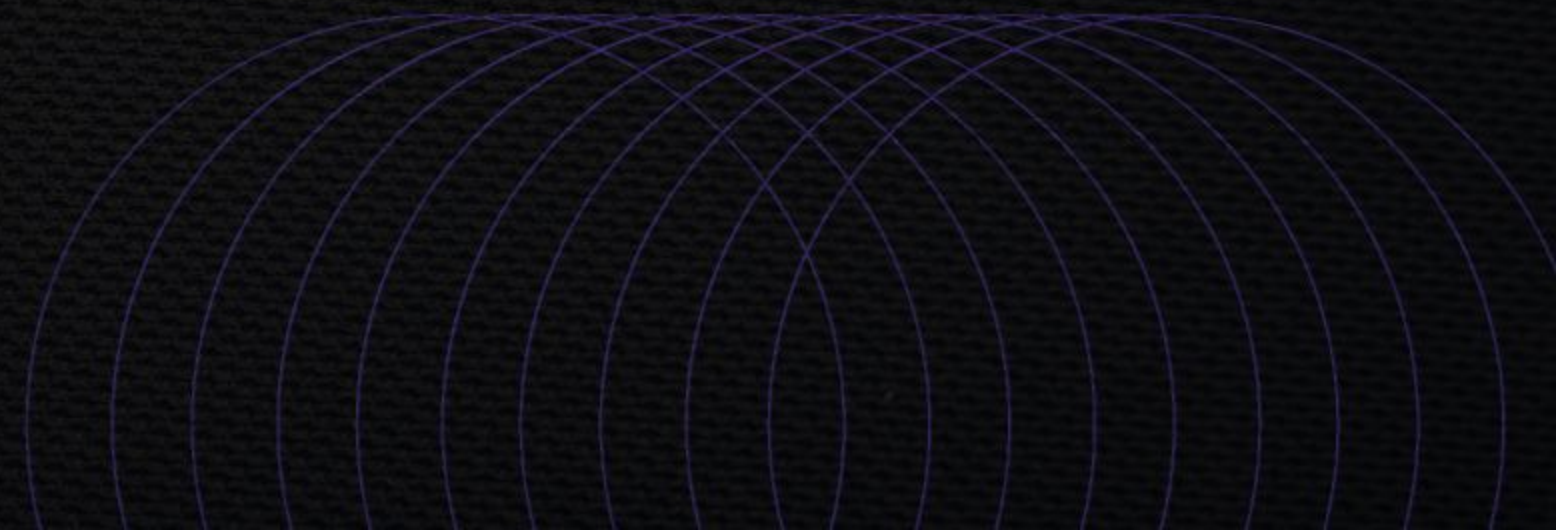
Product-Led Growth

Product-led growth é uma estratégia de crescimento que utiliza o próprio produto como meio de adquirir e reter os usuários, permitindo que eles tenham acesso aos recursos **desde o início** da experiência com seu negócio.



Automação

Receber e orientar os usuários manualmente
ficou no passado



Escalabilidade

- Ampliação do atendimento com menos recursos
- Receber e orientar mais usuários
- Lidar com problemas comuns sem consumir recursos
- Atendimento humano focado em:
 - Problemas específicos
 - Clientes de ticket mais alto

Segmentação

- Categorias de usuários e contextos diferentes
 - Fluxos de onboarding diferentes
- Acompanhamento da jornada de cada usuário

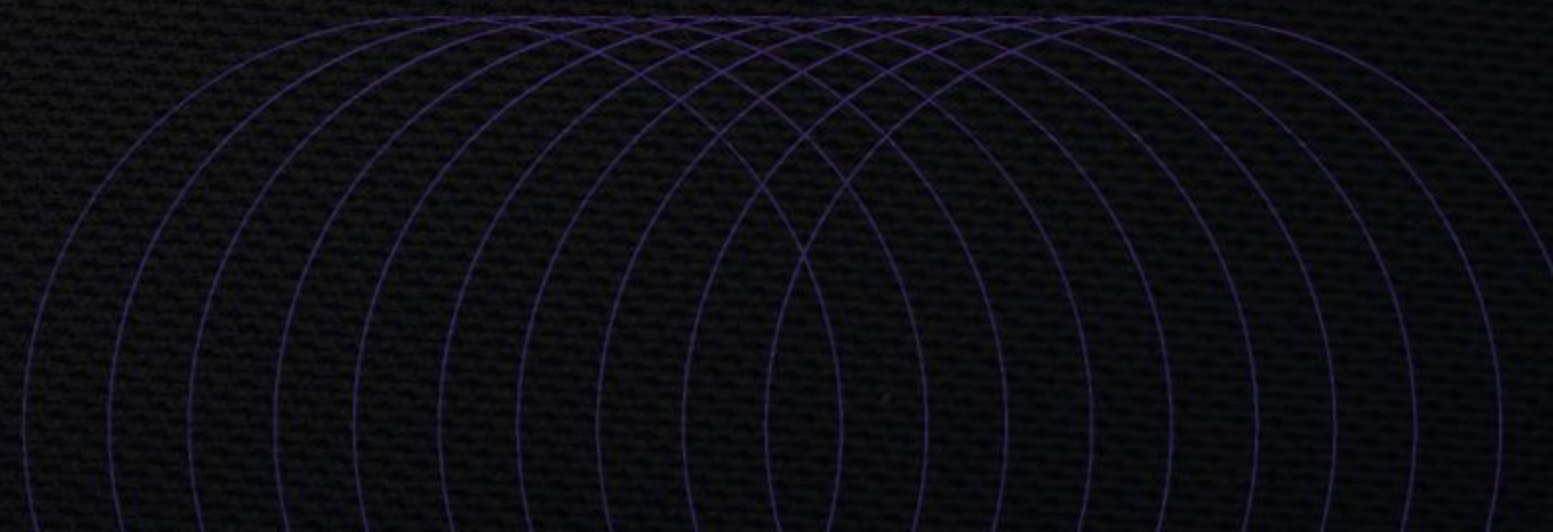
Manutenção

- Fácil criação e manutenção de elementos de onboarding
- Menos esforço para atualizar o fluxo de onboarding
- Material de onboarding dinâmico
 - Uso do próprio produto para guiar o usuário
 - Sem necessidade de atualizar materiais estáticos, como manuais e vídeos



Interatividade

Um bom onboarding ocorre por meio da
interação com os usuários



Experiência integrada


- Personalização
 - Integração do fluxo de onboarding à experiência no produto
 - Explícita, implícita e contextual
- Segmentação
 - Apresentação de diferentes fluxos de onboarding para diferentes categorias de usuários
- Análise de dados
 - Avaliação do fluxo de onboarding com base no comportamento do usuário
 - Taxas de visualização e conclusão
 - Testes A/B

Elementos in-app

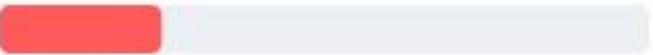
- Checklists e barras de progresso
- Central de ajuda com autoatendimento
- Tours guiados e guias interativos
 - Modais
 - Tooltips
 - Hotspots
- Coleta de feedback
 - Pesquisas in-app
 - NPS

Checklist


✕


Welcome to KeyHole! 

Start monitoring your brand like a pro

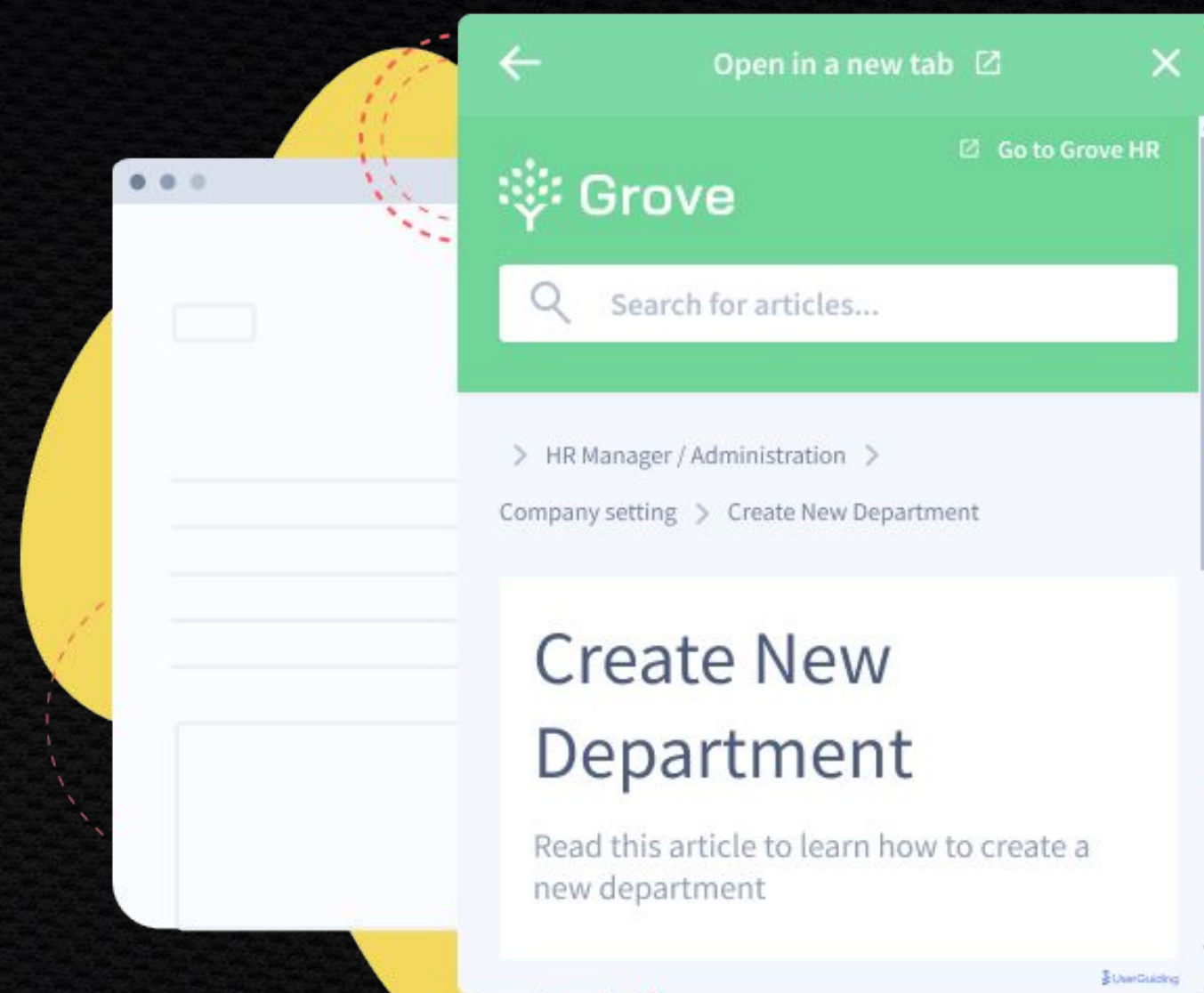
25% 

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

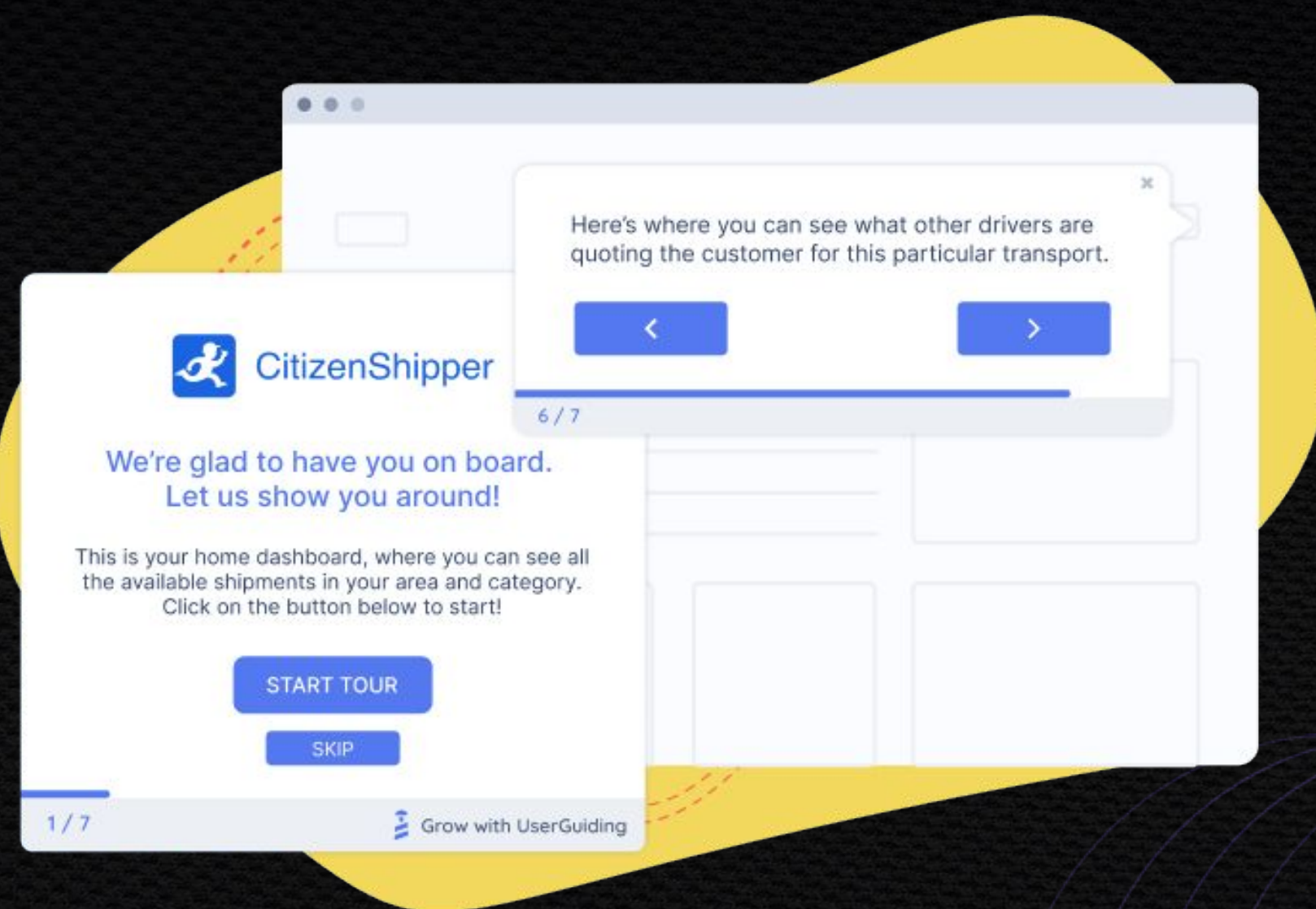
 Grow with UserGuiding

 Get Started ³

Central de ajuda

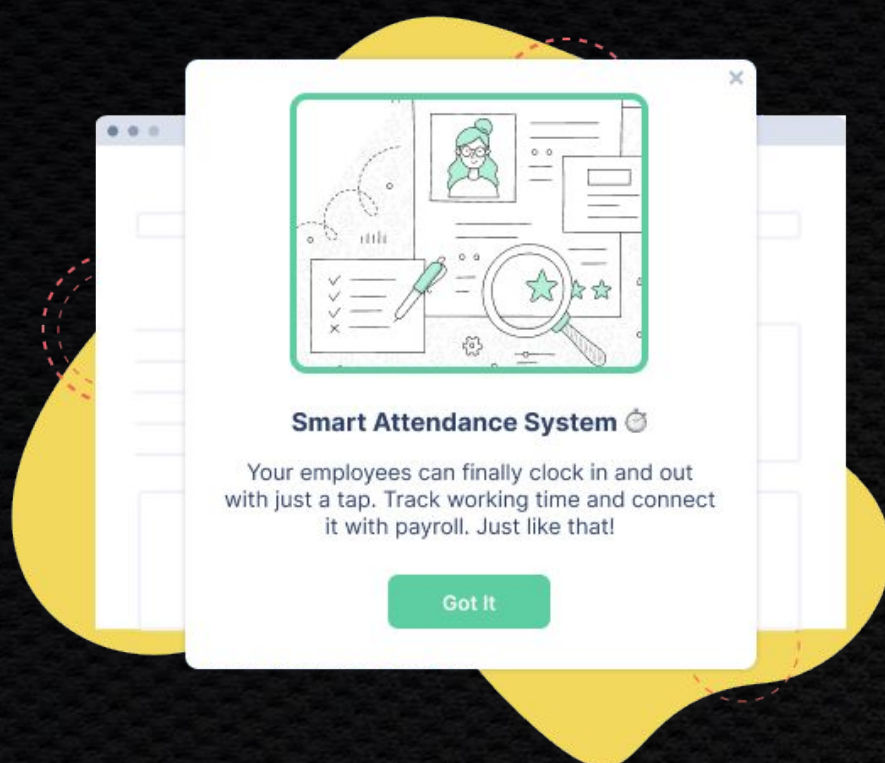


Tours guiados

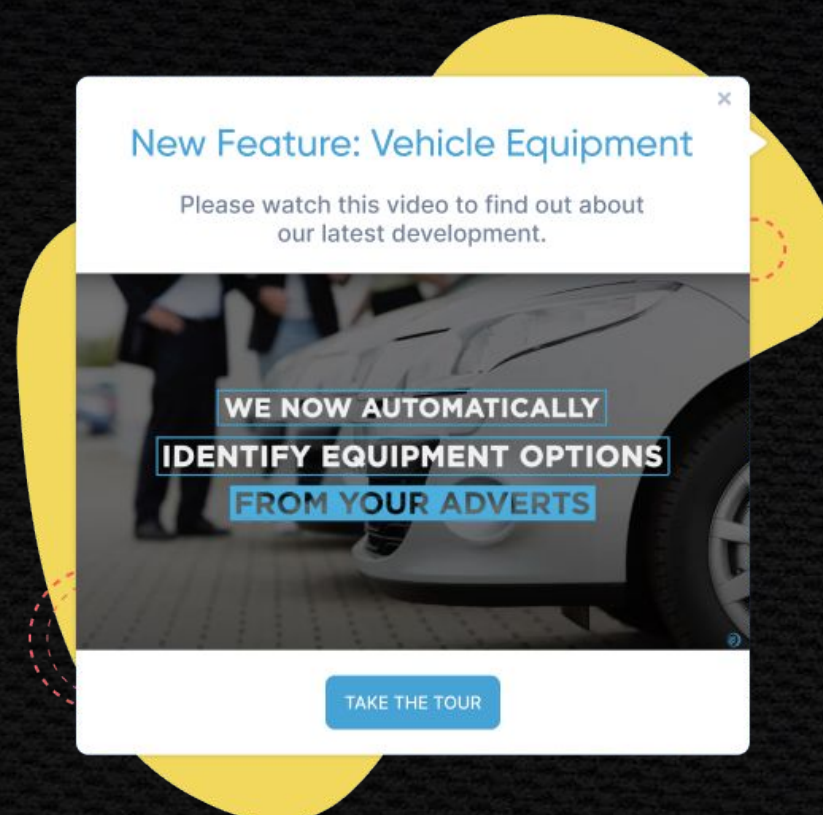


Elementos de um tour

Modais



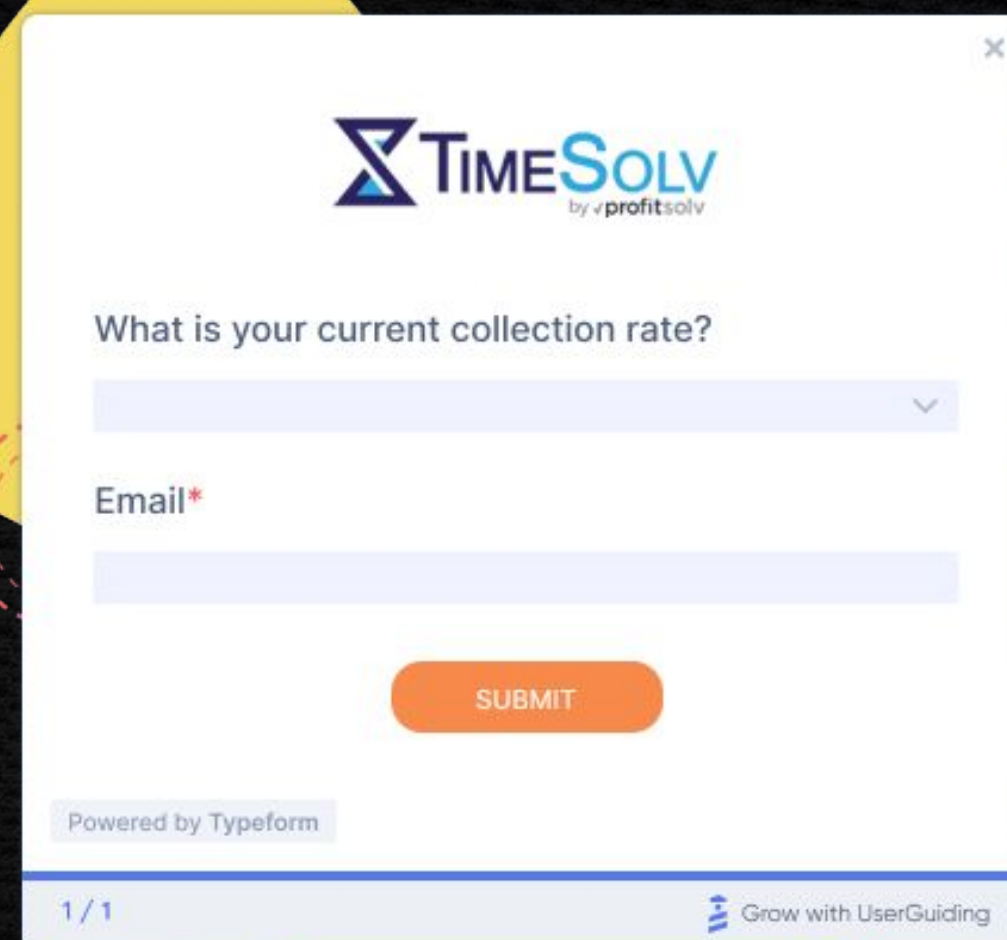
Tooltips




Hotspots



Pesquisas in-app





by vprofitsolv

What is your current collection rate?

Email*

SUBMIT

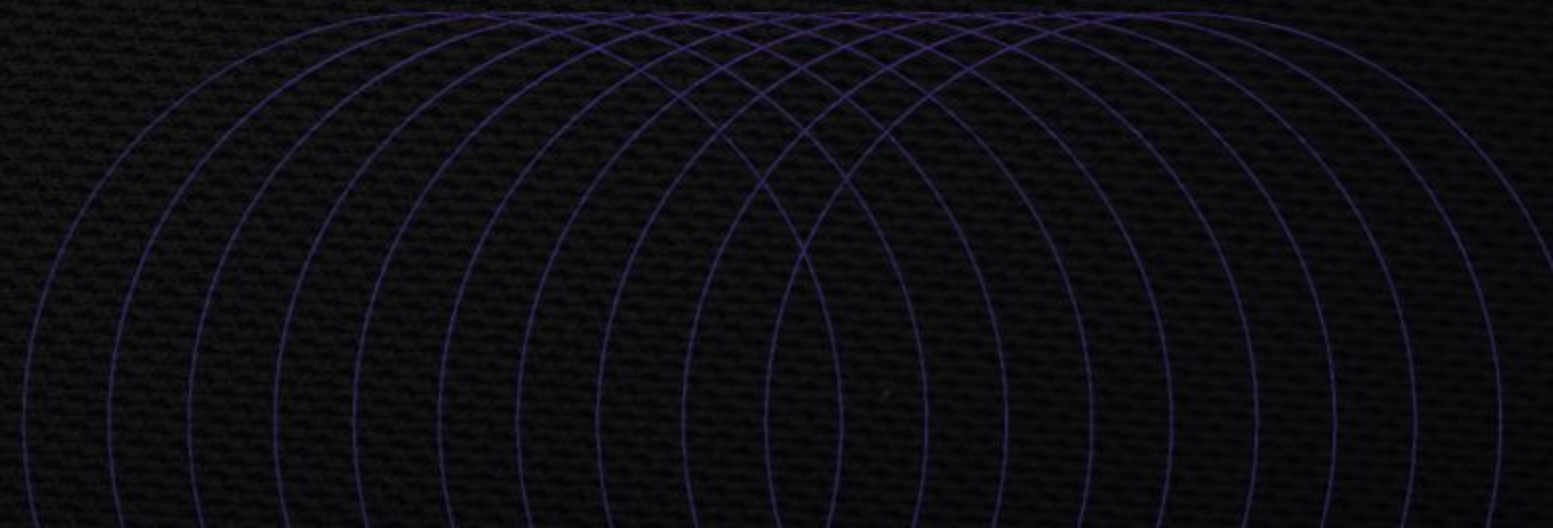
Powered by Typeform

1 / 1  Grow with UserGuiding

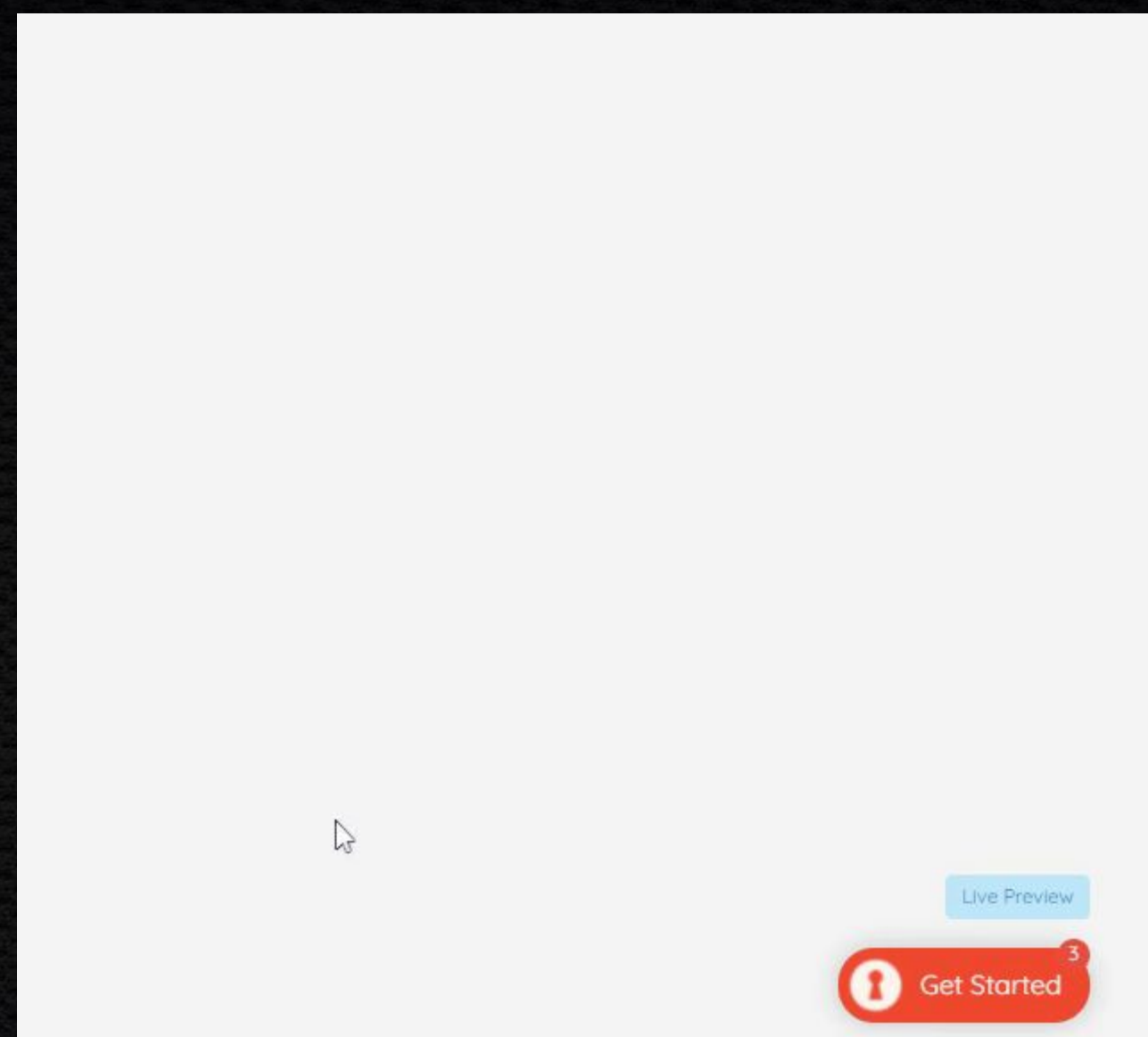


Exemplos

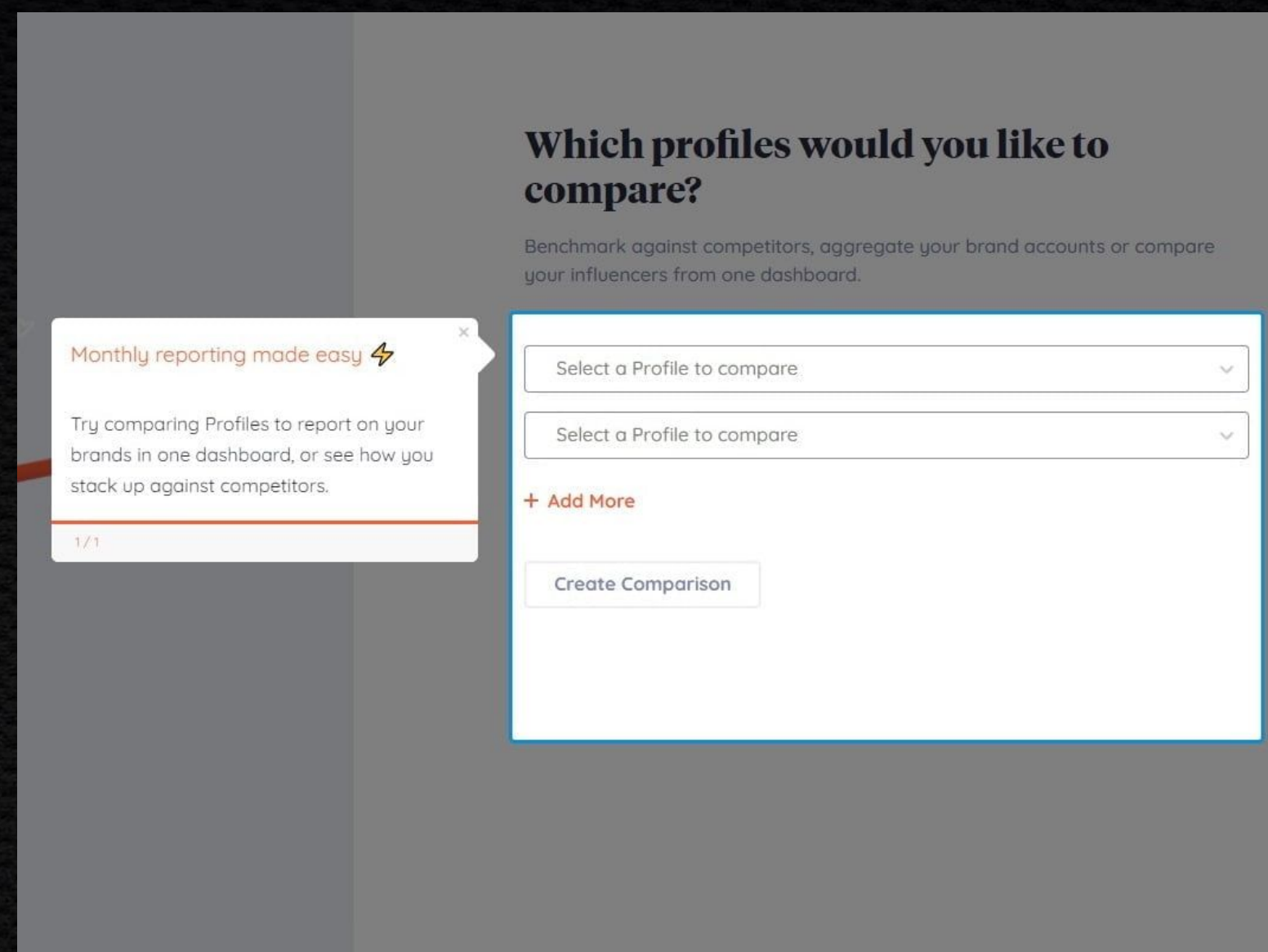
Casos reais de
onboarding interativo



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

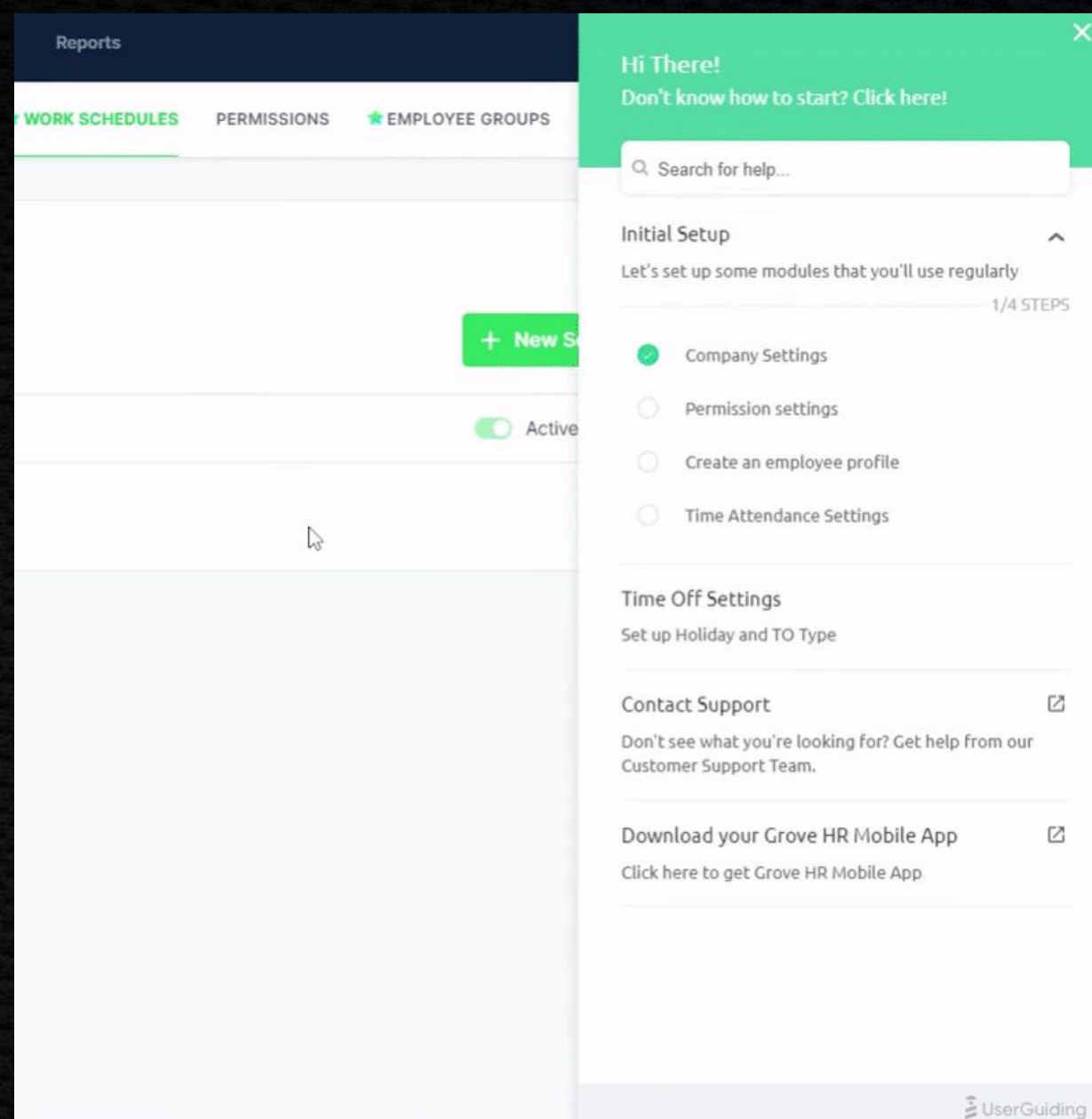
Select a Profile to compare

+ 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 positioned at the bottom of the form. A tooltip on the left side of the interface, 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 includes a close button (x) and a progress indicator (1/1).

Case: Grove HR



The screenshot displays the 'Reports' section of the Grove HR application. The main content area includes a sidebar with navigation options: 'WORK SCHEDULES', 'PERMISSIONS', and 'EMPLOYEE GROUPS'. A '+ New S...' button and an 'Active' toggle are also visible. A 'Hi There!' onboarding overlay is present on the right, featuring a search bar and a list of initial setup tasks. The tasks include 'Company Settings' (checked), 'Permission settings', 'Create an employee profile', and 'Time Attendance Settings'. Below this, there are sections for 'Time Off Settings', 'Contact Support', and 'Download your Grove HR Mobile App'. The UserGuiding logo is visible at the bottom right of the overlay.

Reports

WORK SCHEDULES PERMISSIONS EMPLOYEE GROUPS

+ New S...

Active

Hi There!
Don't know how to start? Click here!

Search for help...

Initial Setup
Let's set up some modules that you'll use regularly
1/4 STEPS

- Company Settings
- Permission settings
- Create an employee profile
- Time Attendance Settings

Time Off Settings
Set up Holiday and TO Type

Contact Support [Contact Support](#)

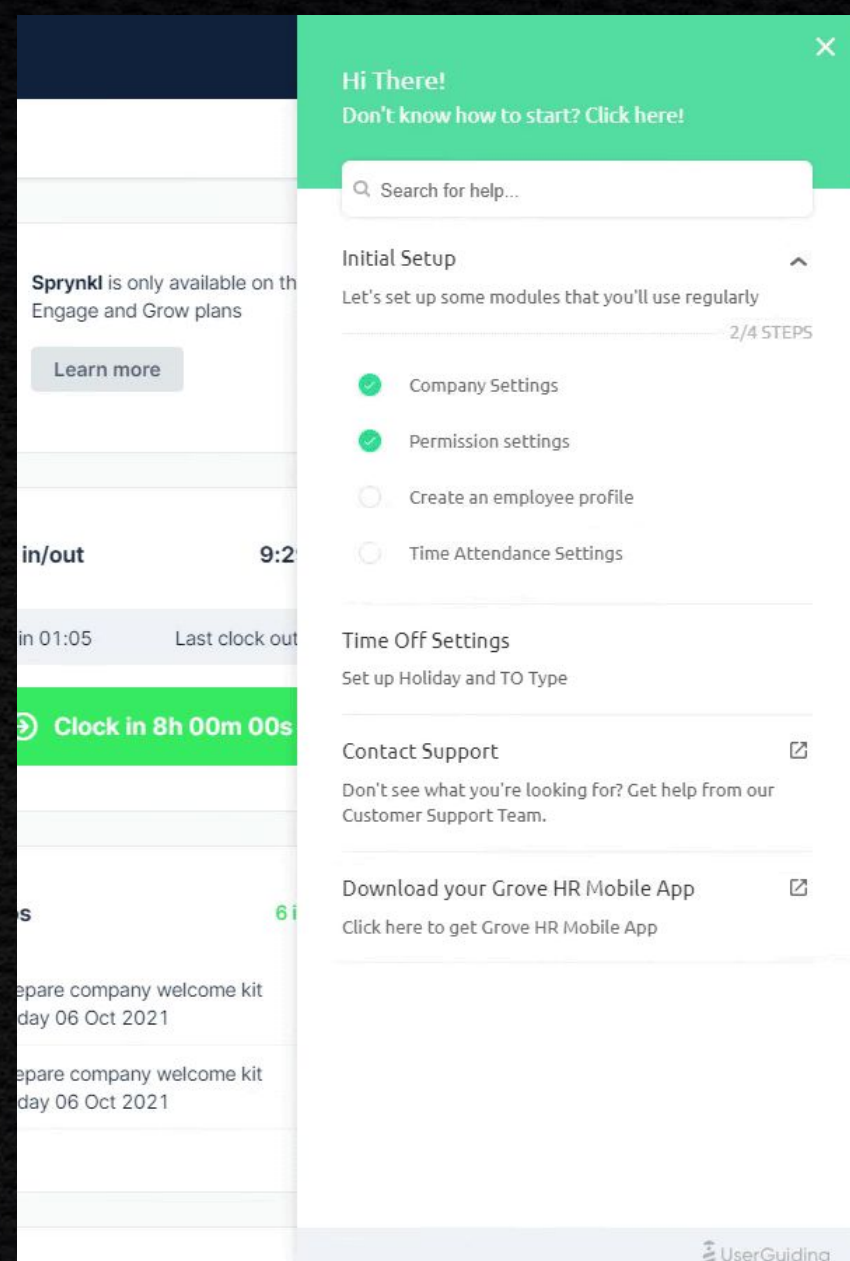
Don't see what you're looking for? Get help from our Customer Support Team.

Download your Grove HR Mobile App [Download your Grove HR Mobile App](#)

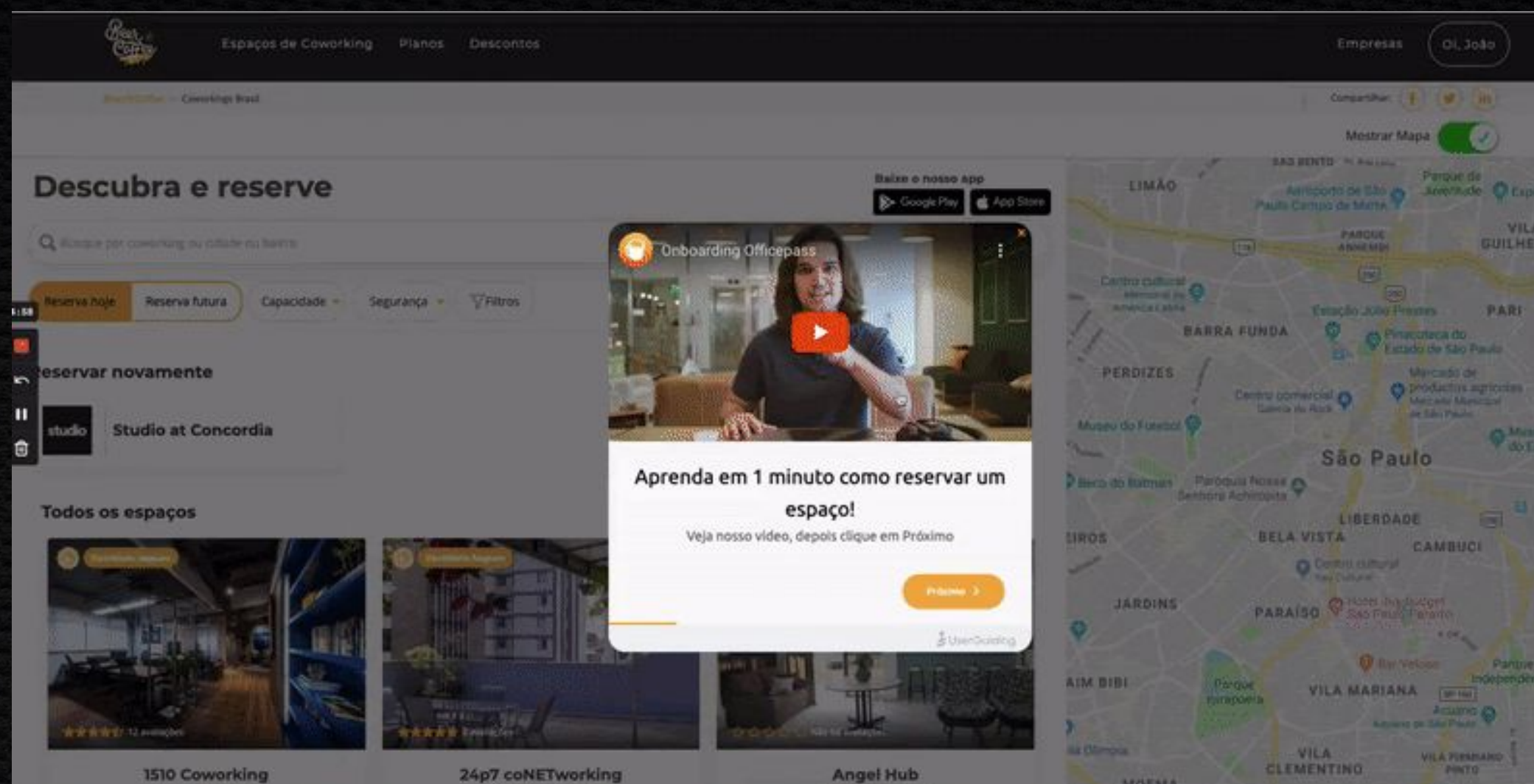
Click here to get Grove HR Mobile App

UserGuiding

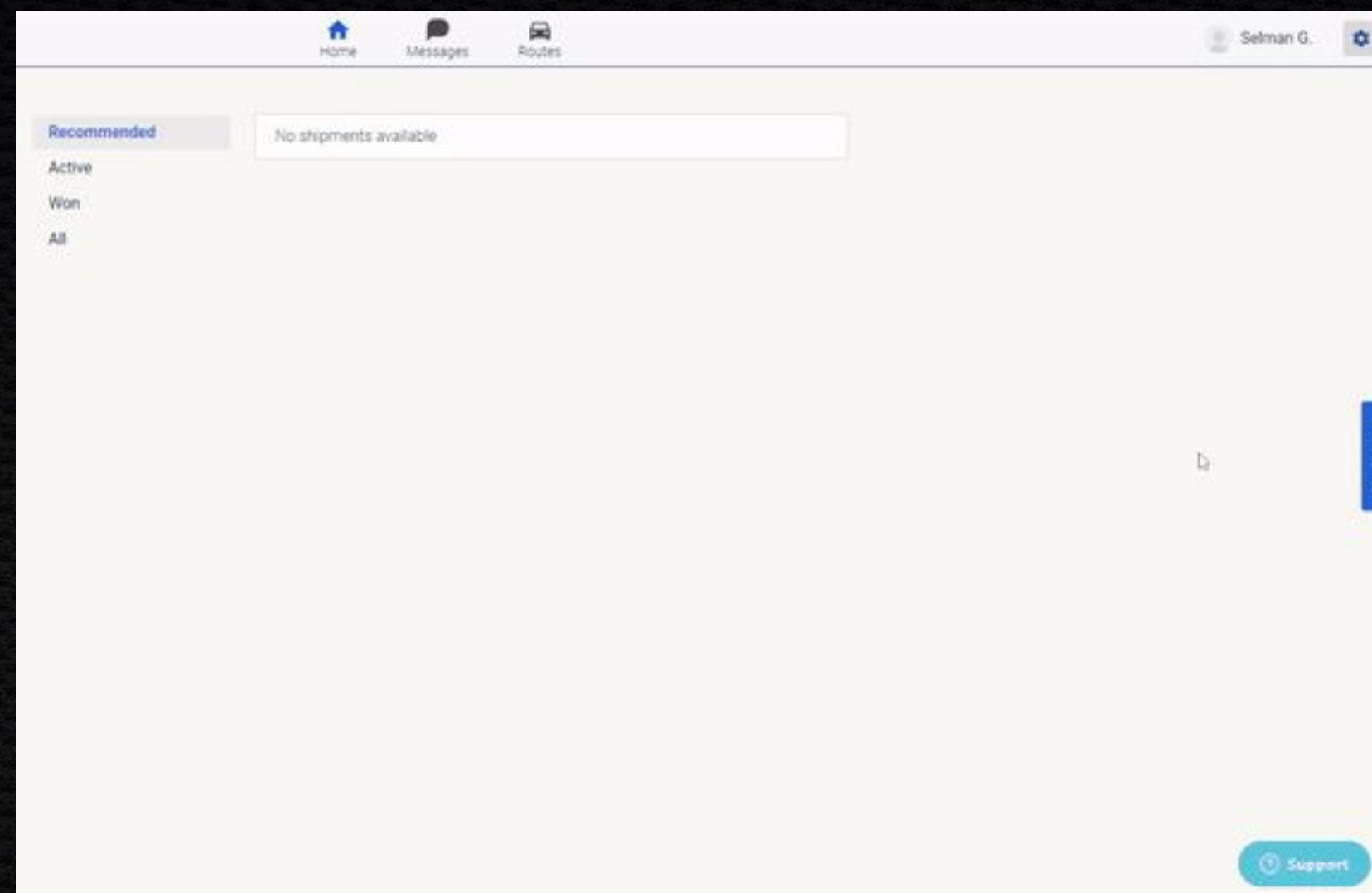
Case: Grove HR



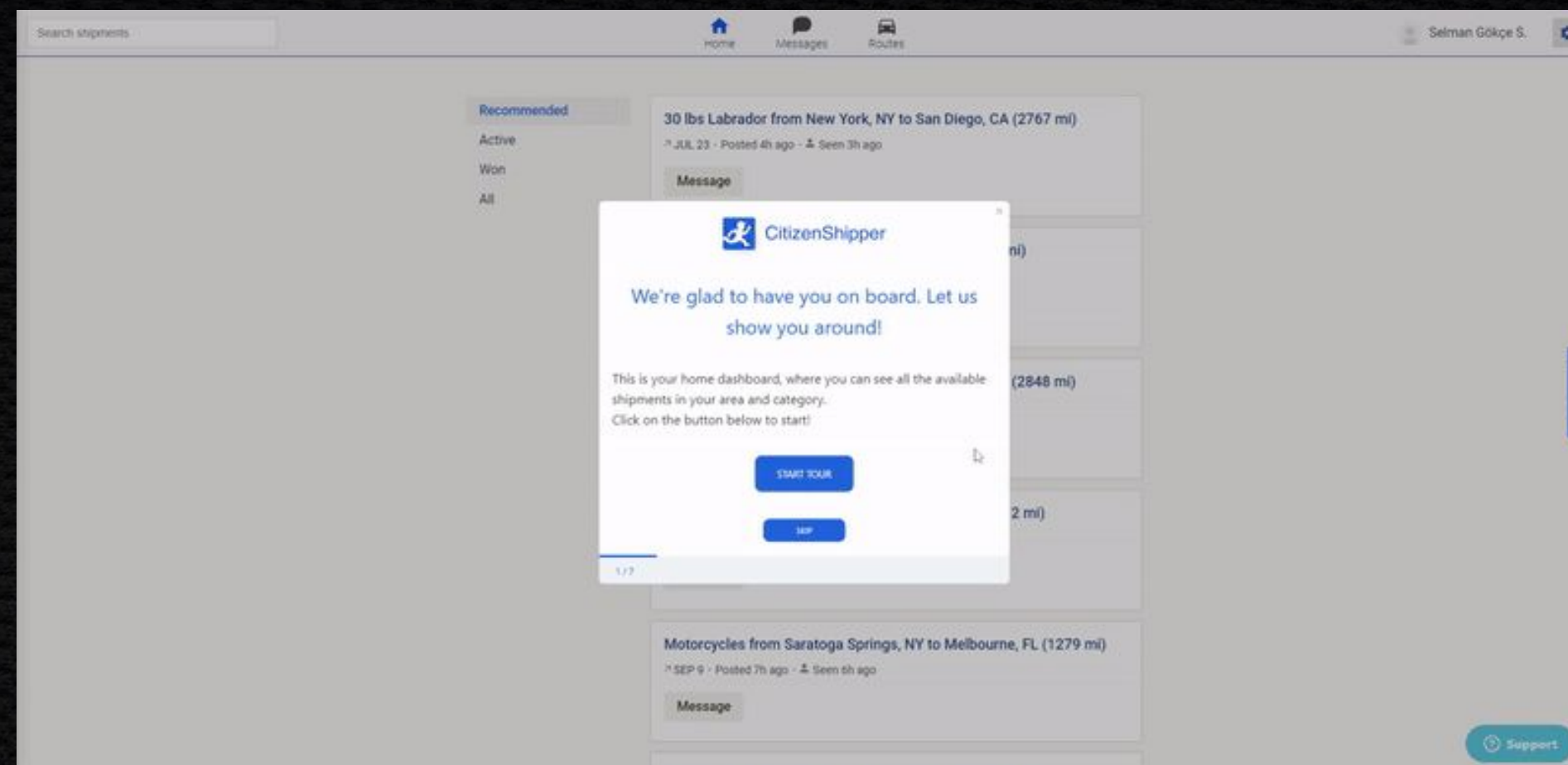
Case: BeerOrCoffee



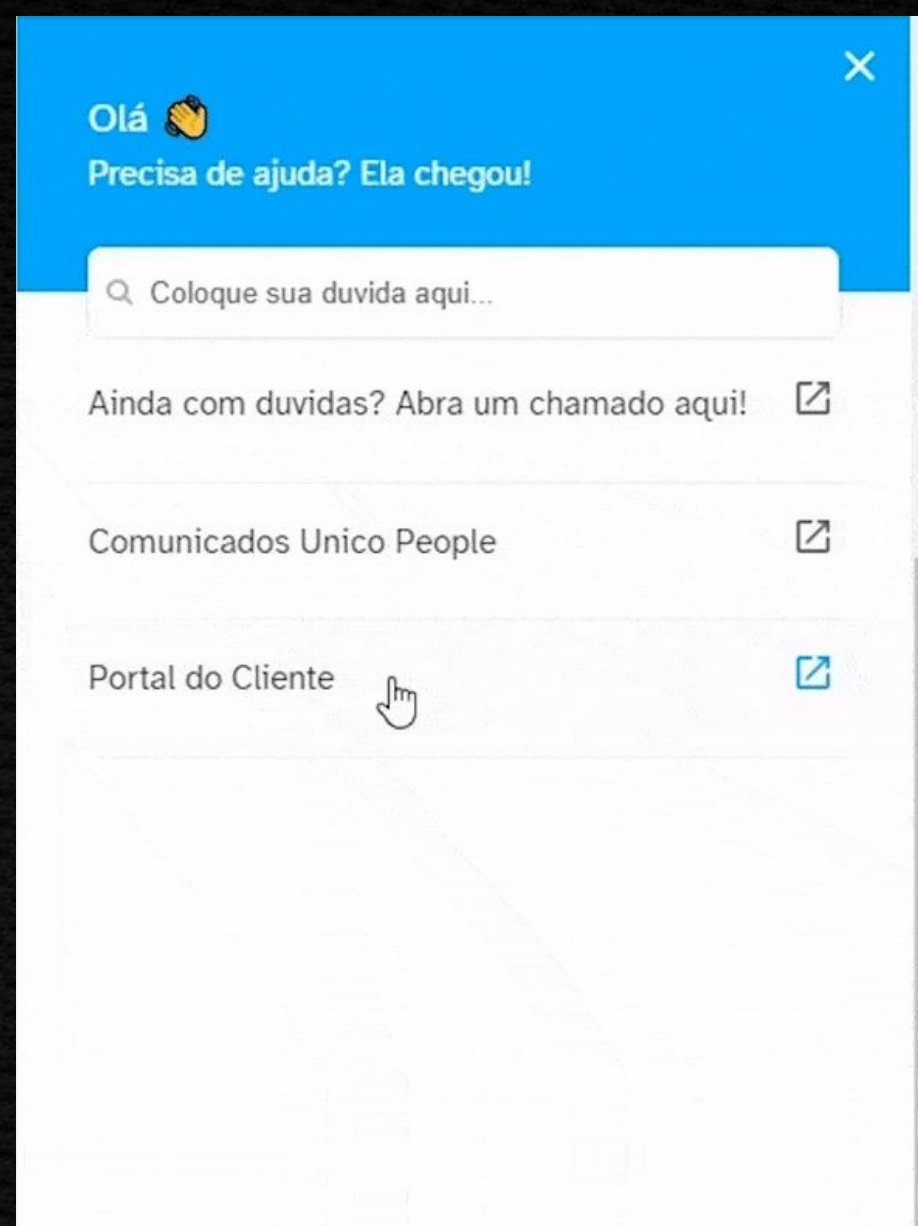
Case: Citizenshipper



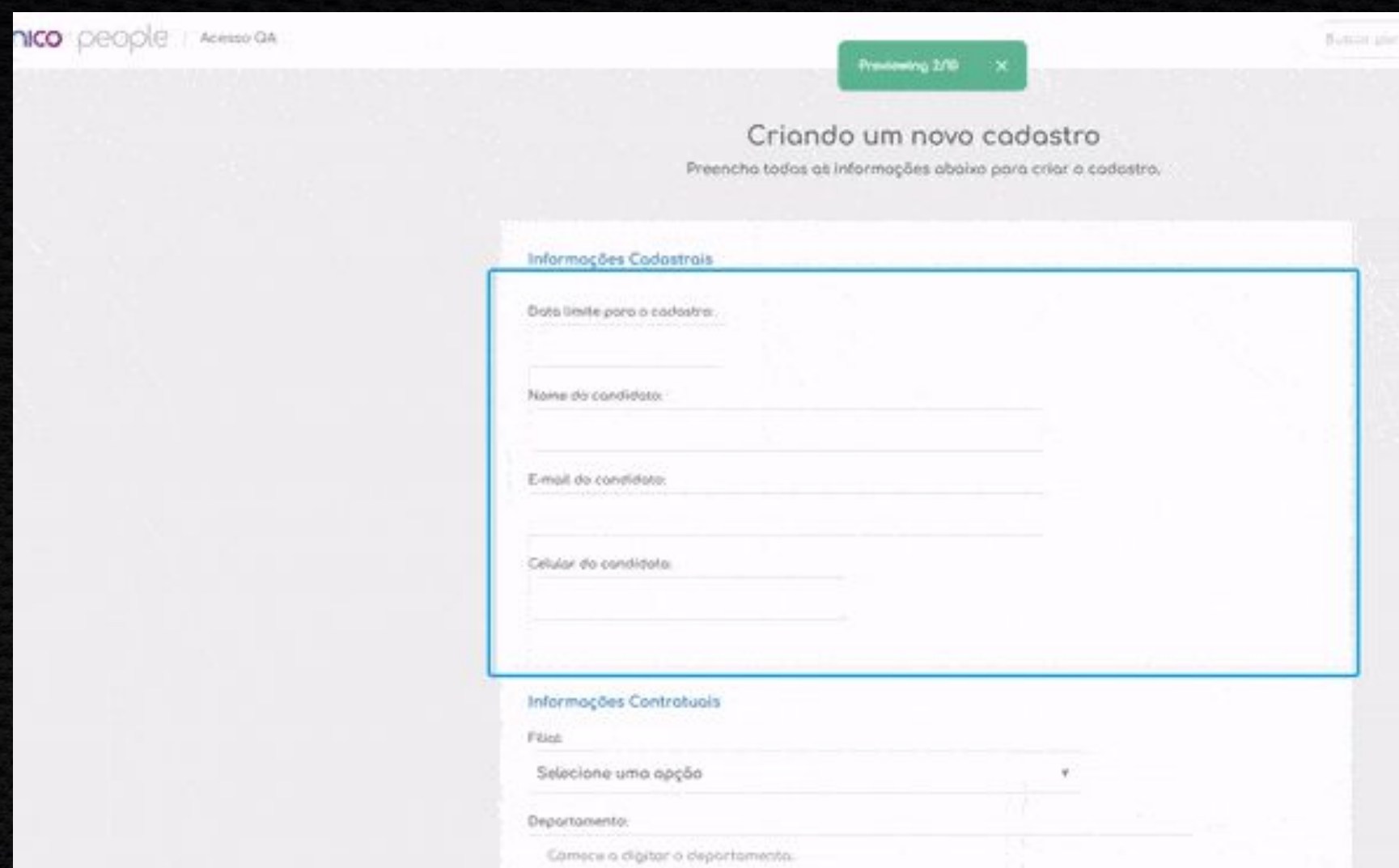
Case: Citizenshipper



Case: Unico

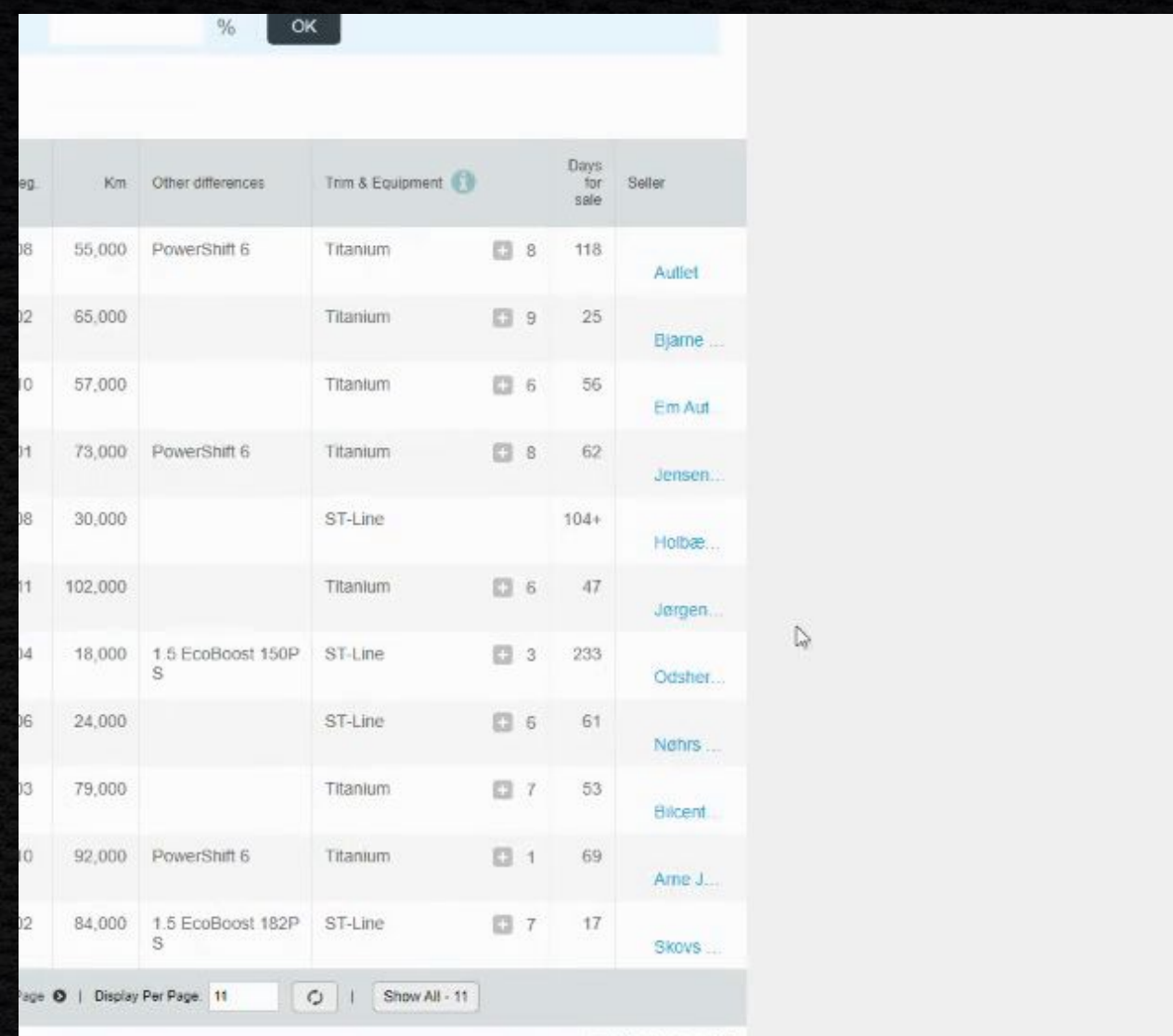












Case: Unico



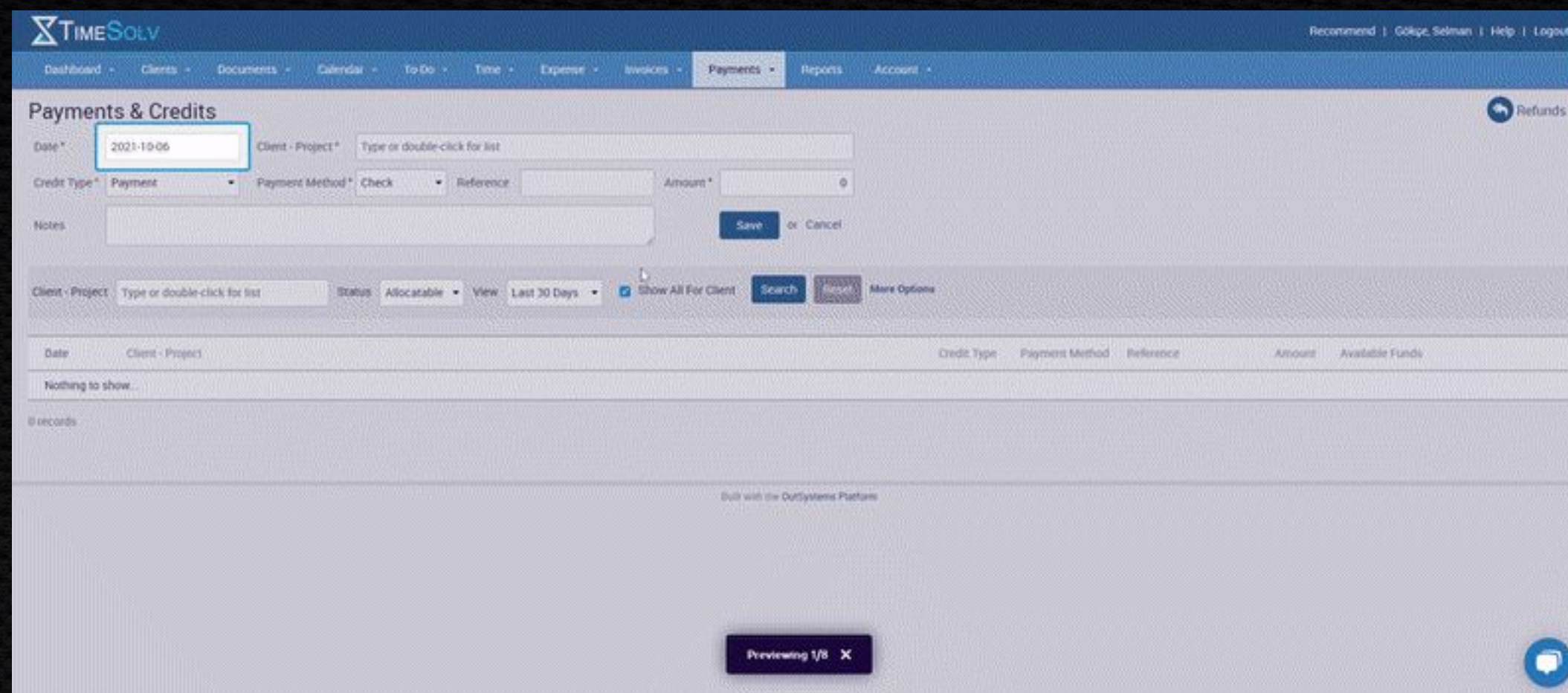
The screenshot shows a web form for creating a new registration. At the top left, it says "unico people / Acesso QA". In the top right, there is a search bar with the text "Buscar por nome". Below the search bar, there is a green button labeled "Próximo 2/3" with a close icon. The main heading is "Criando um novo cadastro" with the subtitle "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 the following fields: "Data limite para o cadastro:" (with a date picker), "Nome do candidato:" (with a text input), "Email do candidato:" (with a text input), and "Celular do candidato:" (with a text input). The "Informações Contratuais" section contains: "Fluxo:" (with a dropdown menu), "Departamento:" (with a text input and a placeholder "Comece a digitar o departamento."), and a "Selecionar uma opção" label above a dropdown menu.

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 ...

Page 1 | Display Per Page: 11 | Show All - 11

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

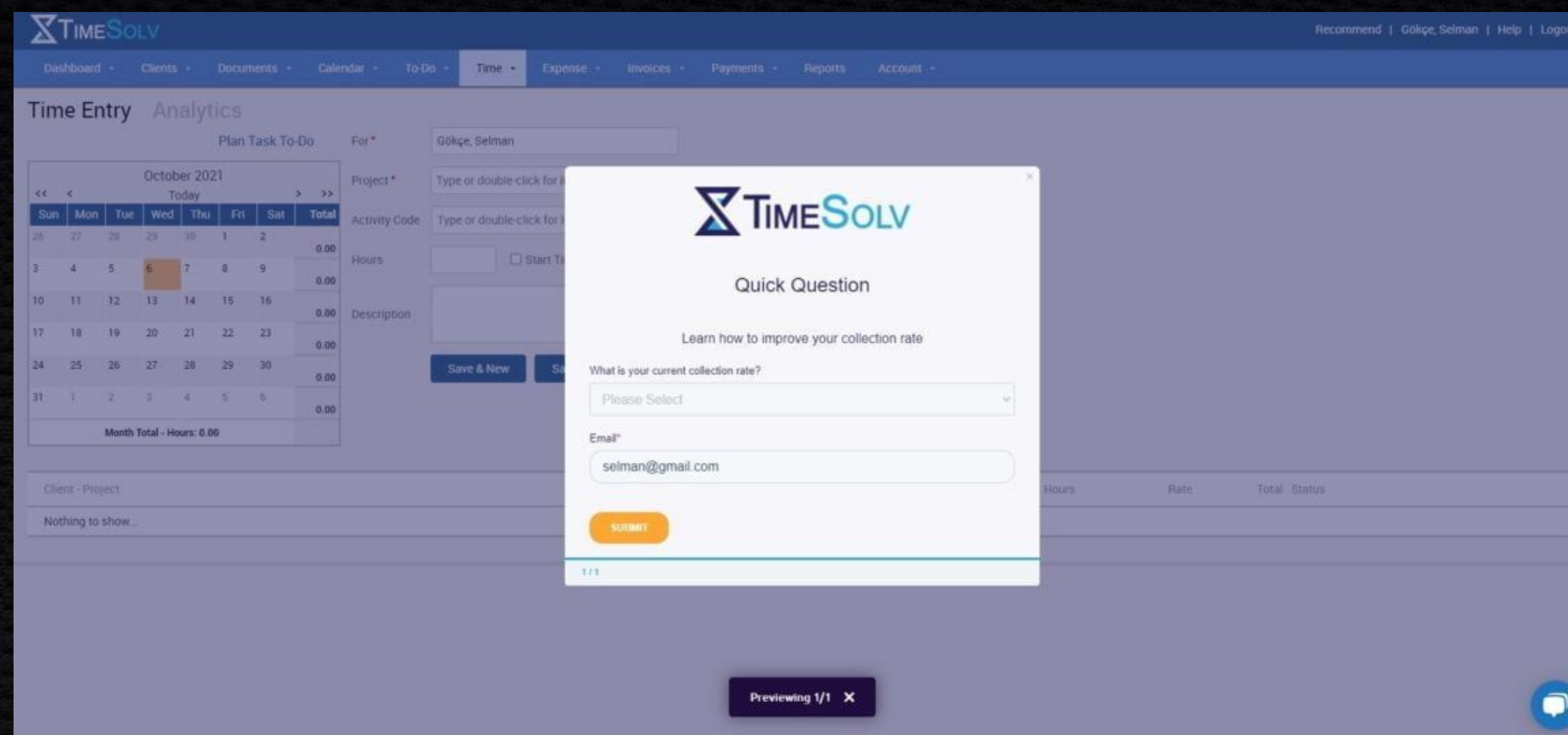
Date	Client - Project	Credit Type	Payment Method	Reference	Amount	Available Funds
Nothing to show...						

0 records

Built with the OutSystems Platform

Previewing 1/0

Case: TimeSolv



The screenshot displays the TimeSolv web application interface. The main header includes the TimeSolv logo and navigation links: Dashboard, Clients, Documents, Calendar, To-Do, Time, Expense, Invoices, Payments, Reports, and Account. The user is logged in as Gökçe Selman.

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							

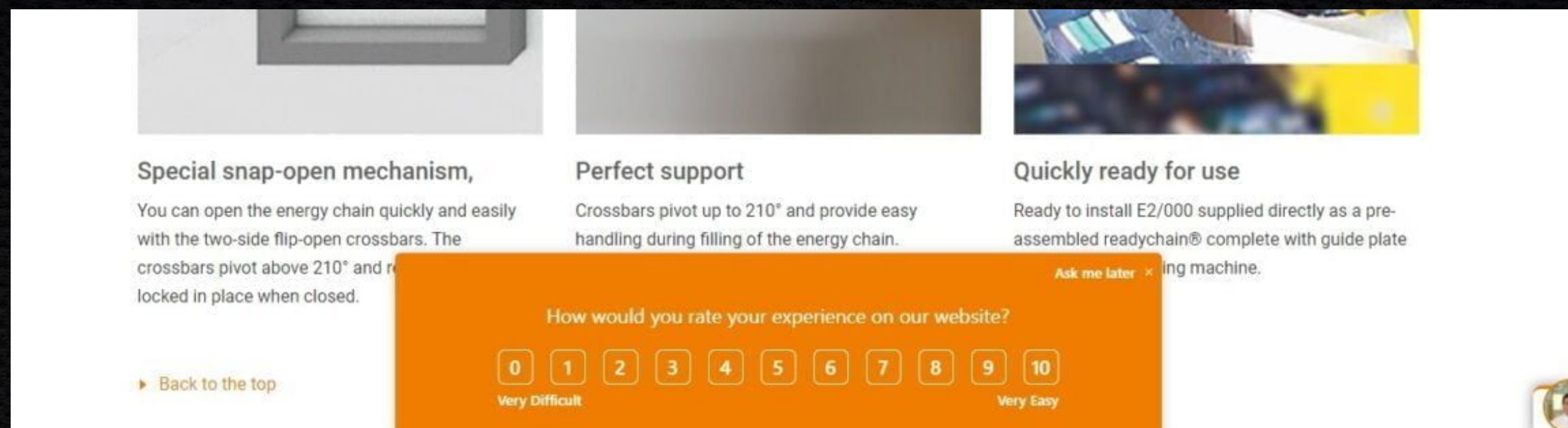
Below the calendar, there are input fields for 'For *' (Gökçe Selman), 'Project *', 'Activity Code', 'Hours', and 'Description'. There are 'Save & New' and 'Save' buttons.

A 'Quick Question' modal dialog is overlaid on the interface. It contains the following text and form elements:

- TIME SOLV logo
- Quick Question
- Learn how to improve your collection rate
- What is your current collection rate?
- Please Select (dropdown menu)
- Email* (input field containing selman@gmail.com)
- SUBMIT button

At the bottom of the modal, it says '1 / 1'. In the bottom right corner of the application, there is a 'Previewing 1/1' button and a chat icon.

Case: Igus



The screenshot displays three product feature columns on a white background. Each column has a small image at the top, followed by a bold title and a descriptive paragraph. A blue feedback survey overlay is positioned in the lower center, featuring a rating scale from 0 to 10 and a 'Back to the top' link on the left. A small circular profile picture is visible in the bottom right corner of the page.

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.

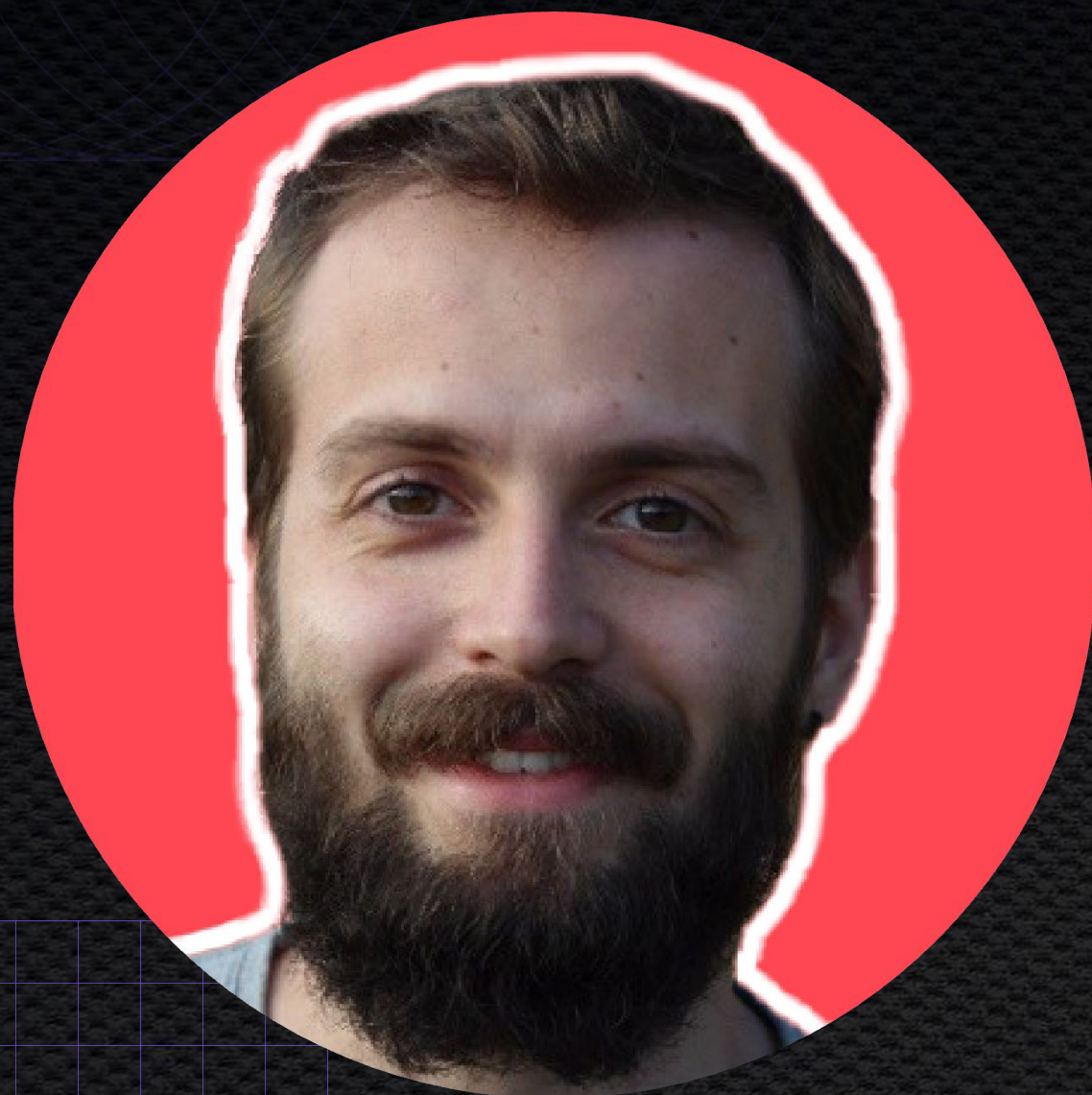
Quickly ready for use
Ready to install E2/000 supplied directly as a pre-assembled readychain® complete with guide plate and mounting machine.

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 ×

▶ Back to the top



Muito obrigado!

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userguiding.com/pt-br