
How To Craft A Killer Onboarding Process

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Onboarding

Once you've developed a new product, it's now time to plan out the onboarding process. "Where do I even begin?", you might ask.

This guide will take you through everything you need to know about crafting a killer onboarding process that will not only get users fully up to speed with your product, but could also convert them into paying or higher paying customers (depending on whether your company adopts a freemium model).

Let's back up a little, and go over the end goal of onboarding a new user.

You might be quick to answer that it is, "To teach them how to use our product!". Well, yes! But, not exactly...

The actual goal is to get people to **achieve first value in as little time as possible**. In simpler terms, you want your users to find out your product's core value and how it benefits them, and get them to that 'aha moment', as soon as possible.

We are living in an age in which more than 75% of app downloads result in the user opening an app once and never coming back. Yes, you read that correctly, three out of four people ditch an app after just ONE encounter with it.

What caused these users to churn?

The answer? Poor onboarding. Three of the four people didn't grasp the value of the app quickly enough and thus, decided to bid it adieu. In this booklet, you will learn the top 10 tips for crafting your very own killer onboarding process.



1 Identify Your Product's Value Proposition

The goal of onboarding is to get people to achieve first value in as little time as possible. In order to do that, you first need to identify your product's value proposition. This shouldn't be too unfamiliar to you, as you should have identified this way before creating your product. If you haven't identified your value proposition, or you need something to jolt your memory, here are some questions you can ask yourself.

- 1. What does your company do?**
- 2. What sets you apart from your competitors?**
- 3. Who is your target audience?**
- 4. What are their pain points?**
- 5. How does your product remedy the issue?**
- 6. Besides alleviating pains, does your product provide any added value to users?**

Next, taking the answers to these questions into consideration, try to express your value proposition in a sentence or two. Ask yourself, "Why should users use my product instead of a competitor's product?".

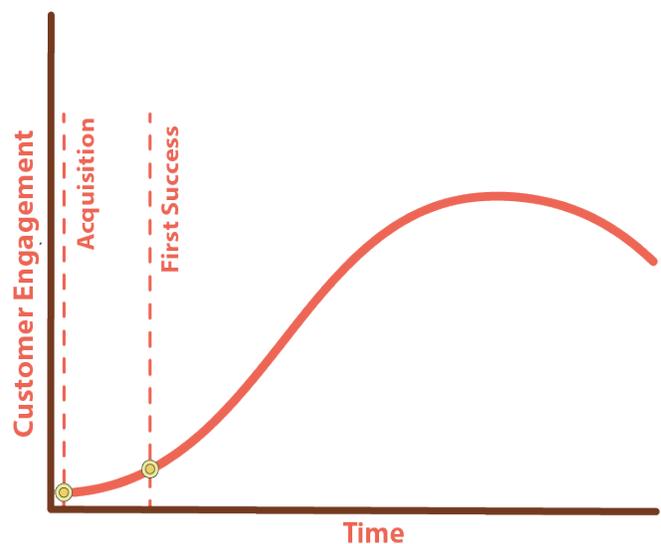
Viola, that's your product's value proposition!

2 Introduce Your Value Proposition ASAP



Now that you've identified and expressed your value proposition, you now need to find out how to get your users to feel the benefits of that value in the shortest amount of time. The faster that users find and understand your product's core value, the more likely they are to eventually become an enthusiastic, profitable customer.

Take a look at the graph on the right. There are two significant points, when a user is acquired, and the time they take to achieve first success with your product. The time between those two points is incredibly critical because they play a significant role in determining whether a user will churn or not. The longer users take to reach first success, the more likely it is that they will churn.



To get your customers to reach first success more rapidly, you need to think about which feature(s) of your product best represent your value proposition. After that, you need to figure out the best and most efficient way to introduce and teach your users about those features. Making the transition from acquisition to first success as quickly as possible will permanently win your users over.

3 Welcome Users Well



You now have all the necessary content to onboard your users! However, before you throw them into the deep end and bombard them all the information you're thrilled to share with them, welcome them to your company and product. You want to express to your users how much you value them by thanking them for signing up for your service. At the same time, you also want to start sharing your value proposition with your users.

Many SaaS companies welcome their users with a simple welcome email. Welcome emails should be well, welcoming! It should have a warm tone, be fun or funny, and offer any additional guidance if necessary. To take your welcome emails to the next level, you can even include colors, images, gifs, or even videos to make the effect more visually appealing. Let's take a look at MailChimp's welcome email.

Did You Know...

Welcome emails generate **4x** the open rates and **5x** the click rates compared to other bulk promotions.

Key Takeaways

1. Make Them Visually Appealing

MailChimp strikes a perfect balance between looking professional and exciting. The use of colors and icons makes this email stand out.

2. Drive Your Value Proposition

After reading this email, you immediately know what you can accomplish with MailChimp, and how it makes your life easier.

3. Add Hyperlinks and Buttons

The hyperlinks after each bullet point and the 'Get Started' buttons are all great additions. Did you know that buttons increase click through rates?

4. Let Users Know How to Get Support

Users feel more connected to you when they know there's a direct line to the company, and are much less likely to stop using the product when facing difficulties without contacting you first.

Bonus: Welcome Users Through Video

Switch things up and welcome them using a video. Did you know that our brains process imagery 60,000 times faster than text?!

These tips can apply not just to welcome emails, but also to all onboarding emails!

Welcome to MailChimp!

Thank you for joining us, Miku. Here's an overview of how your MailChimp account works.

- Build Your List**
Your subscribers are [managed in lists](#). Check out our [list requirements](#) and then learn how to grow a list of subscribers.
- Create a Campaign**
Jump start your [email design](#) knowledge and [build your campaign](#) to share your message with your subscribers.
- Test and Send**
[Test your campaign](#) to get an idea of what your subscribers will see in their inboxes. When you're ready, [schedule or send](#) your campaign.
- Run Reports**
Check out campaign performance in [reports](#). Improve your strategy using powerful analytics and data to create campaigns that [target subscribers](#) based on their interests.
- Keep Improving**
[Getting Started](#) and [MailChimp Fundamentals](#) help outline the basics of your account, and our comprehensive [Knowledge Base](#) is there when you have questions.

[Get Started](#)

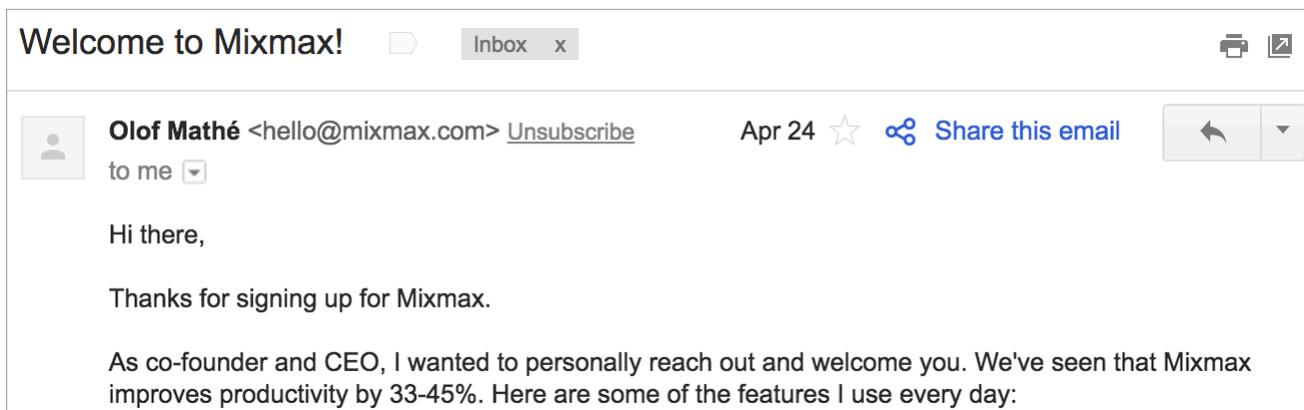
Need Additional Support?

Free accounts come with 30 days of email support, and all paid accounts have access to email and live chat support.

[f](#) [t](#) [i](#) [in](#)

4 Send Emails from the CEO/Founder

Another tip to take your onboarding process to the next level is to send emails, or at least the welcome email, from the CEO or Founder himself. Users feel special and important when the CEO welcomes them personally, even if it's just the Marketing team behind it! You'll be perceived less like a faceless, corporate entity, and instead make your company seem accessible to everyone. Sending welcome emails from the founder of CEO also establishes a conversational relationship from day one, and builds trust with the users. Let's take a look at this example from MixMax, an email tool.



It's always nice to be personally contacted, not just by anyone, but by Olof, the CEO of Mixmax. It's a great way to make a user feel like they are valued, even if they aren't a paying one! It also endorses the message included, and makes users more inclined to try out the product.

5

Give a Tour of Your Product!



Product tours are a great way to orient new users, and help them decipher the fastest way to get to their first instance of value garnered. Tours walk users through the product, and point out key steps that may have otherwise been missed.

Here are some pointers for a great product tour.

1. Introduce 2-5 of the Basic Features

- Keep it simple and short; if not, it'll feel like a hassle to read.
- Show them how to use the features that drive your value proposition
- Advanced features can be left for the resources page on the website

2. Keep Text Short and to the Point

Ensure your text is 140 characters or less - like Twitter. Or, I guess with the new update, old Twitter!



3. Make It Interactive

This is a great way to engage users; gamification works perfectly here.

4. Make It Optional

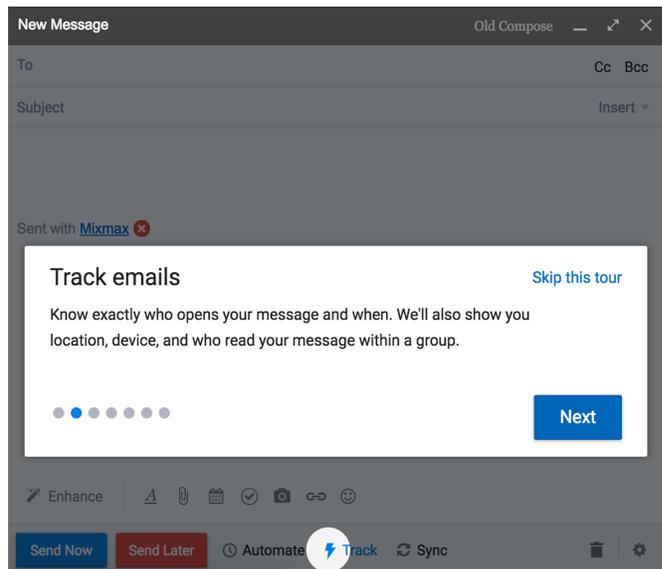
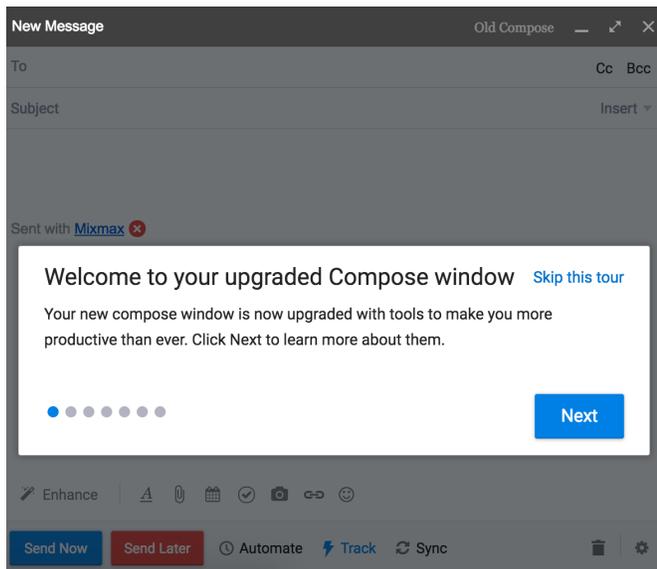
- Allow users to control the pace of the tour with 'Next' buttons because...
- Some people are faster learners than others!
- Some might already know how to use your product.



6 Set Expectations Early

Which do you think is easier? - Starting a journey with no idea of the destination or time required, or starting a journey and knowing exactly what to expect and how long it'll take?

I'm guessing you picked the latter. This concept also applies to onboarding. By letting users know where there are in the process and how much they have left to go, users will be more motivated to complete the onboarding process. Let's look at how Mixmax apply this concept.

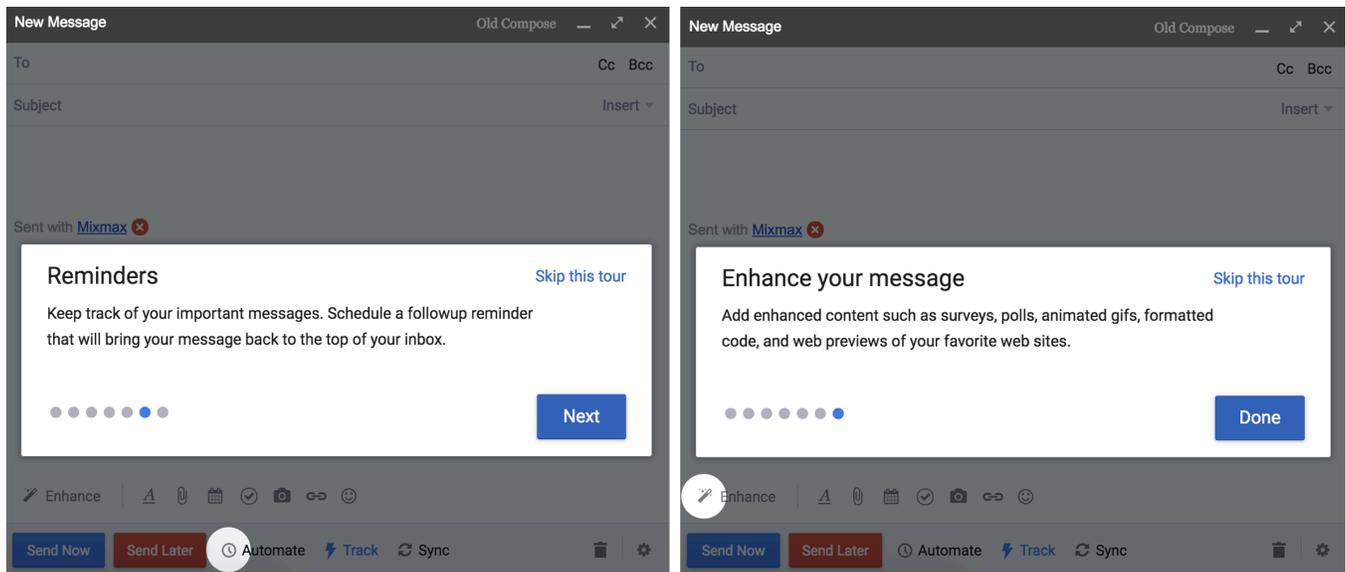


Mixmax integrated their tour within Gmail itself, and included a small progress bar at the bottom left. This gives users a sense of security that they know how many steps are left, and it's not an undetermined number. Users can also control the pace of the tour.

It's also thoughtful to include the option to 'Skip This Tour' for people who might not want to go through the entire tour at that time, or people who

are already familiar with the platform. The only thing that was lacking in this onboarding process was a pronounced back button, in the case a user wanted to revisit a page.

They might assume that you can click the gray dots to navigate back, but you cannot assume that people will know any particular trend in user interfaces.



Here are some tips we can learn from Mixmax's tour:

- Include a progress bar
- Allow users to control the pace of the tour
- Have the option to 'Skip This Tour'
- Have a pronounced back button

7 Introduce Resources to Users

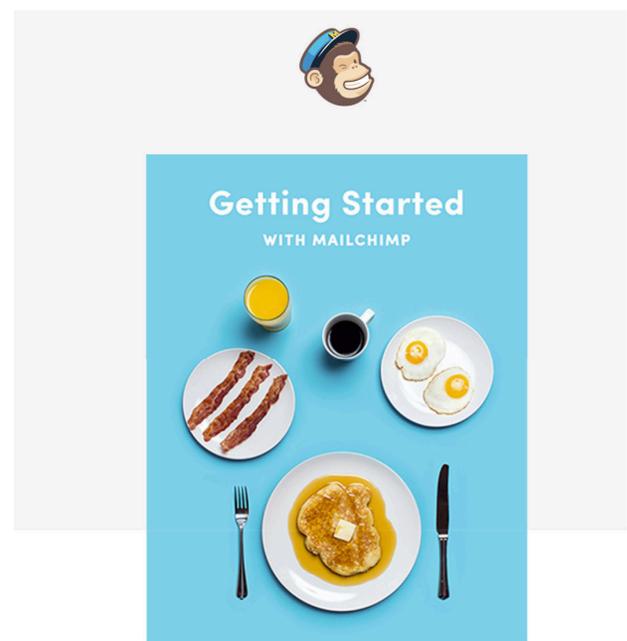


Most, if not all, SaaS companies have comprehensive resources pages on their websites, but in most SaaS onboarding processes, the resource library is rarely introduced to new users.

These resource pages usually include FAQs, tutorial videos, case studies, and more that can help users maximize their productivity while using their product. It's a real shame if users can't take advantage of tools, simply because they don't know these resources exist! Therefore, it is extremely critical to introduce these features to your users at some point during the onboarding process.

Take a look at how MailChimp did this.

This email was sent to introduce MailChimp's step-by-step guide. If the guide is not introduced via email, it could easily go unnoticed on MailChimp's website.



Our step-by-step guide offers everything you need to [get your first campaign off the ground](#). Learn how to manage your list, customize your template, and analyze performance to fuel future success.

[Read The Guide](#)



8

Don't Make It Look Automated

In tip four, we covered how sending emails from the CEO/Founder makes users feel more connected to the company, and establishes an enduring relationship by building trust with the user, not to mention how it endorses the messages and makes users more inclined to try out the product.

How do you think a user would feel if you told them that that email they 'received from the CEO' was not actually sent out by the CEO? Instead, it was automated... That's like telling a kid the money he got from under his pillow was from his mom, instead of the tooth fairy.

Although almost everything is automated nowadays, there are ways to make automated emails not seem automated. Or at least, less automated.

Here are some tips to make emails not seem automated:

- Send emails from a personal or corporate email address, instead of a third party email marketing service
- Personalize the sender's fields
 - This increases open rate by about 3%
- Personalize your email copy using the user's information
 - "Welcome John!" versus "Welcome!" can increase your open rates by 20%
- Say cheese! Include an avatar or 'profile picture' for the account
- Make sure your emails end up in Primary folder (Not spam or promotions)



9

Taper Off Contact Slowly

Onboarding is like teaching someone how to ride a bike. You can't just give them a bike, and tell them to ride it. Nor can you hold their hand and guide them forever. Instead, you want to teach them the necessary skills to ride the bike on their own, so eventually the training wheels won't be necessary.

You want to guide them during their first few rides, ensuring they don't fall and hurt themselves. Then, you want to slowly take off their training wheels, give them more freedom, and watch them ride off by themselves.

Just like teaching someone how to ride a bike, you want to slowly taper off your onboarding process. You don't want to end it too abruptly when users aren't ready to be on their own, but you also don't want to be sending them onboarding emails forever.

Tip!: You can space out the frequency of your emails e.g. 1 email every 3 days to 1 every 7, to 1 every 2 weeks etc.





10 Show Users How Much You Value Them

Throughout your entire onboarding process, you must ensure that your users feel like they are valued. If I have to pick a tip that trumps all other tips, it would be this one. Why is this so?; you might inquire...

Everyone likes to feel valued! A valued user is a happy user. A happy user is not only more likely to come back, but they're also more likely to spread the word about your company/product. This can greatly help with your brand reputation as a customer-centric company. Also, if a customer feels unappreciated, they are more likely to take their business to another company that makes them feel valued. Now, we don't want that, do we?

How do you show your users that you value them?

The answer is very simple, but the execution is a little harder. Simply apply these tips to

your onboarding process, and try to customize them to suit your product, company, and customers. The tips in this guide are not a cookie-cutter template that you can use to craft your own onboarding process. You need to get down into the little details. Only then, will you be able to craft your very own killer onboarding process.

Good luck!

