chameleon

User Onboarding Handbook:

Craft Exceptional Flows from Concept to Launch

Table of contents

User onboarding is *everywhere*

From the very first user's interaction with your product all the way through to the point when they become your biggest advocates, **the onboarding never stops**.

This may seem counterintuitive because *"intuitive products don't need onboarding"*, but that statement is far from the truth.

The truth: For every product, stage of a user journey, new feature, redesign, or subscription upgrade you should offer relevant onboarding guidance.

You'll apply different tools and techniques to different onboarding flows, but you need a strategic approach to ensure consistency and continual improvements.

Your onboarding framework should consist of a **who** (responsible people on your team), **when** (cadence of experiments and improvements), **why** (clear metrics and goals), **where** (channels you use), **what** (content), and **how** (design style).

It's important to continuously test and measure your onboarding flows because what you learn about your users and your product along the way may not follow the conventional wisdom. You can start from established best practices, and you can adjust them for your context.

Use this handbook as **your go-to guide for user onboarding.**

Inside, you'll find:

- An overview of what user onboarding is (and isn't)
- Tips on how to implement behavioral science into your flows
- A detailed assessment process for your existing onboarding
- Insights on how to measure the onboarding success
- Tools for a multi-channel onboarding tech stack

Plus, there are best practices, quick wins, checklists, and a resources cheatsheet to accompany you as you master the art of user onboarding.

Your journey to crafting exceptional flows starts here. **Welcome on board!**

User onboarding is not what you may think

User onboarding is not:

❌	**Just good UX**

❌	**Just a designer's job**

❌	**Just an intuitive product**

❌	**Only the first-time user experience**

User onboarding is:

✅	**The system of actively guiding users to find new value**

✅	**The initial experience, training, and the acclimation**

User onboarding often might not mean what you think it does. The term gets thrown around in the SaaS world but has varying definitions – even to people on the same team. Some say it's user training, others that it's indistinguishable from user experience, while some imagine it to be a welcome message.

But how are you supposed to create effective onboarding flows if your team isn't on the same page? Let's clear the air about what user onboarding is – and isn't.

Remember, an onboarding flow can have a specific purpose. It can be:

- **Success-focused:** The purpose is to educate users on how to navigate the product and get the most out of it.
- **Feature-focused:** Onboarding flows don't always revolve around education for new users. They often help onboard current users to new features.
- **Account-focused:** This flow type is product-dependent. If account creation is critical for user success, this type of flow is what you need.

However, each and every flow will have the same goal – **reaching the "aha!" moment** and showcasing the real value to users.

User onboarding is more than the first-time user experience

When someone first signs up for a SaaS product, they expect a seamless onboarding experience. You could use modals, in-line help, and interactive tutorials to guide users and lead them to the product's value quickly.

But the onboarding doesn't stop with the first-time experience. It's also essential for upsells and guiding users throughout the product lifecycle.

The more your users learn and discover, **the more value they will get from your product**. This directly impacts the level of adoption and customer retention. In other words, user onboarding is a secret weapon throughout the user journey.

User onboarding is not just a designer's job

It's often assumed that user onboarding is the designer's job. This might make sense if you believe that good onboarding is only about interface design. But it's not. The first step to great user onboarding is understanding that it takes more than visual design to solve the problem of user engagement. That's why you need to set clear responsibilities for managing user onboarding across your company.

Even if your designer is going to be responsible for crafting the onboarding flows, ensure a holistic approach that will include team collaboration. It will lead to higher activation rates and increased product and feature engagement.

User onboarding is not equal to an intuitive product

You've heard it before: *"Great products shouldn't need onboarding".*

But there are **three big problems with this statement**:
1. It seems to be alluding to some holy grail that will enlighten the masses with the truth of your product – it doesn't happen on its own
2. It shifts focus from users to design. So, you are no longer thinking about the problem and you might end up trying to create a trendy, "intuitive" solution (which may not be as effective)
3. It neglects various user onboarding techniques that demonstrably result in higher retention and engagement rates among users

User onboarding is the art and science of first impressions; don't just rely on looking good. Instead, use all the tools and techniques at your disposal. Be careful, though, not to expose everything your product has to offer at once.

Okay, so what exactly is user onboarding?

Here's how we define it:

User onboarding is the system of actively guiding users to find new value in your product. Through the onboarding process, you ensure the customer will be successful when adopting the product or a feature for the first time.

The overall onboarding experience typically includes the initial experience, the training, and finally, the acclimation. The final goal of the onboarding experience is achieving the "aha!" moment – the exact instant where the user internalizes the value of the product.

This onboarding definition works well for two reasons:

- It acknowledges that onboarding extends throughout the user lifecycle. It begins before a user even signs up and it extends past the point they convert to a premium account.
- It understands that user onboarding is much more than just showing users how to use your product. To make users successful, you need to also show them why they need to use it, and give them the help they need to find value.
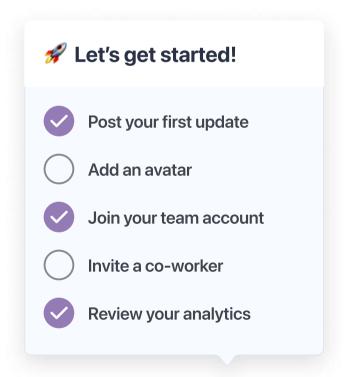
In order to effectively apply this, you need a lot more than just a great UX. You need to understand your customers and nudge them to take the appropriate next steps using *the onboarding process formula.*

For example, depending on the context, you can use in-app widgets to offer additional help or clear onborading steps with an easy-to-follow checklist.

Help Launcher

Need help?

🔍 Search for help

Discover our online academy
140+ Screencasts and Webinars

Check out our help docs
93 in-depth help articles

Submit a help request
Open our chat widget and talk to our team

Onboarding Launcher

🚀 **Let's get started!**

✅ Post your first update

◯ Add an avatar

✅ Join your team account

◯ Invite a co-worker

✅ Review your analytics

The onboarding process formula

The formula for a successful onboarding includes:

- ✓ The right content

- ✓ In the right channel

- ✓ At the right time

Investing time and effort in getting new users to extract value from the product as soon as possible can bring huge benefits. If there's a negative experience, even a mediocre one, users are more likely to abandon the tool.

A good user onboarding experience should not only teach the user how to operate the tool. It has to make them feel valued, receive a good welcome, and perfectly handle the learning curve – curating the onboarding flow so they can explore freely and learn what they need to know to be proficient with the product.

The formula for a successful onboarding includes:

- **The right content**

- **In the right channel**

- **At the right time**

By nailing the **content, timing, and channel** of your user onboarding, you'll go much deeper than just good UX to delight and retain customers. Since there is a correlation between the churn rates and customer satisfaction, you'll get those rates to a record low by perfecting the whole user onboarding experience.

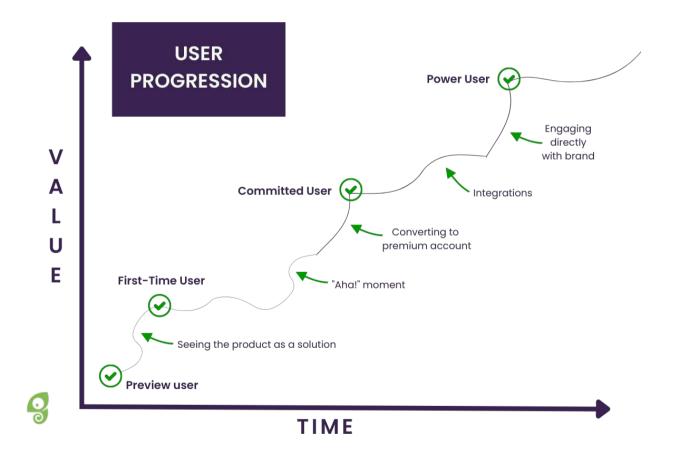# How to apply the formula to 3 stages of user progression

3 main stages of user progression

- ✓ Preview user → First-time user

- ✓ First-time user → Committed user

- ✓ Committed user → Proponent user

With a combination of the right content, timing, and channels, users progress from one stage of the customer lifecycle to the next.

But it's never a smooth progression from being a new user to becoming a power user. Here's the visual representation of the users' progress.

Now, let's apply the onboarding formula to **three key progress stages.**

1. Preview user → First-time user

Onboarding starts before customer education. It starts with marketing. That's right: before the first product experience!

It's easy to forget that many new visitors to your website know next to nothing about you. When you're trying to get these visitors who are "previewing" your product to actually sign up, you need to focus on content that delivers a clear value proposition and positions your company as credible.

- **Timing**: First-time website visitors, or people who haven't experienced your product first-hand yet
- **Content**: Value proposition, knowledge leadership to increase authority and credibility, customer case studies – all as relevant to the viewer as possible
- **Channels**: Your website, ads, blog posts, and publishing platforms (e.g. Linkedin and Medium).

Clearly communicating the core value will motivate people to learn more and actually start using your product.

2. First-time user → Committed user

In the next level, your goal shifts from getting users to sign up to making sure you fulfill the promises you gave in your value proposition – and then some.

At this stage, the content is about specific use cases. You need to explain to users how they can shape the product to match their workflows. For example, how to integrate your product with Slack, Trello, HubSpot, or any other relevant tool.

- **Timing**: When users have experienced your product, but still havent become regularly active users
- **Content**: Most critical concepts – high-level functionality, specific use cases for your product, setup requirements (e.g. connecting to data sources), highest value actions, the path to the "aha!" moment
- **Channels**: Tooltips, product tours, lifecycle emails, in-app messages

When users know how to use your app, they'll be able to see it as a tool that actually helps them, and they'll develop a habit around it.

3. Committed user → Proponent user

The next transition turns your active users into your biggest fans.

The content and channels are a bit more personal at this stage. Since users already know how to use your app (and are doing it well), you need to deepen your relationship with them.

- **Timing**: When users have made a habit of using your product
- **Content**: Anything evangelizing your product, or deepening the connection between the user and your app
- **Channels**: Product community, online and offline conferences, social media, company Slack channel for customers, etc.

Establish a community, respond to users when and where they mention you, and create a solid relationship with them. At this point, share content that shows personality and isn't strictly product-related.

Apply the formula to key progress stages

Preview user → First-time user

Clearly communicating the core value will motivate people to learn more and actually start using your product.

First-time user → Committed user

When users know how to use your app, they'll be able to see it as a tool that actually helps them, and they'll develop a habit around it.

Committed user → Proponent user

Once your users master the ins and outs of your product, it's time to deepen your relationship with them.

Rely on behavioral science to motivate users throughout the onboarding

BJ Fogg Model: These 3 factors determine user behavior:

✓ Ease of use

✓ Value proposition

✓ Effective prompts

The best way to explain the relationship between user onboarding, user engagement, design, and behavioral science is through the **BJ Fogg Model.**
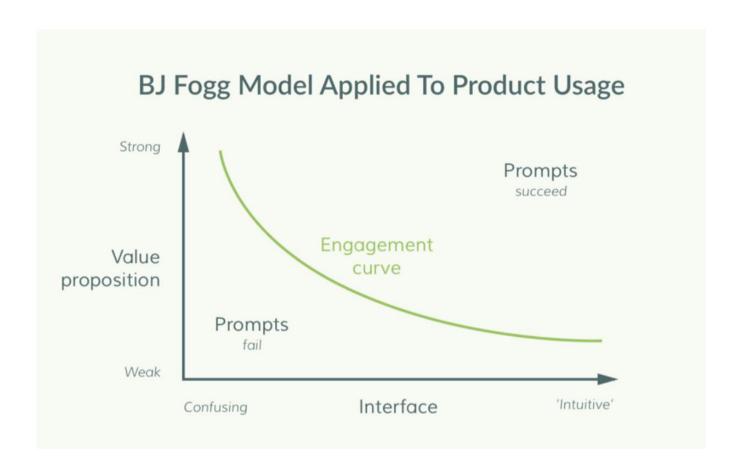
BJ Fogg, behavioral scientist and founder of the Persuasive Technology Lab at Stanford, discovered that the combination of **three factors determines behavior:**

- **Ease of use** (someone's capability to perform a behavior)
- **Value proposition** (someone's motivation to perform that behavior)
- **Prompts** (triggers/nudges for them to perform that behavior)

The balance of these three elements can determine whether or not users engage with your product or specific features
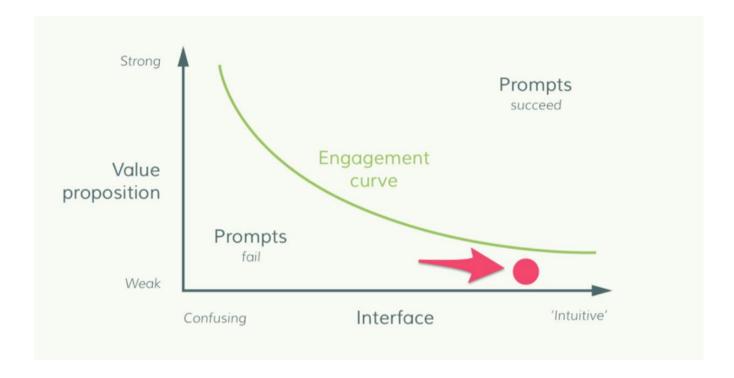
Here on the right, you'll see a visual representation of the BJ Fogg Model, applied to product usage. Note that disengaged product users fall on the "fail" side of the curve, while engaged users fall on the "succeed" side.
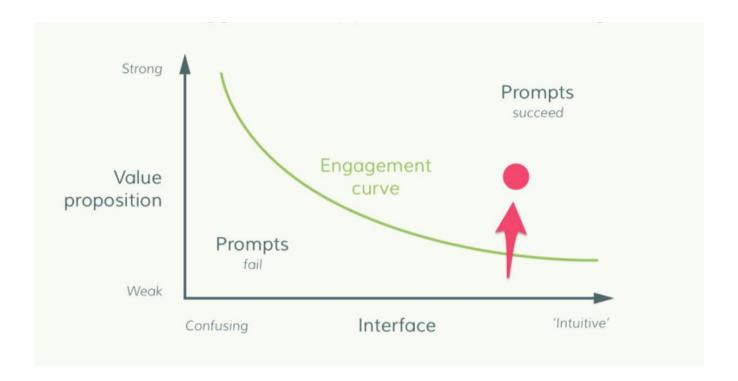
BJ Fogg Model Applied To Product Usage

Let's consider **two aspects of a value proposition:** the strategic and the tactical.

Part of your success depends on the fundamentals of your company or the ways your product mission matches the market needs. **This is the strategic aspect,** which requires the founders or executive team to decide and refine. If this is not working then you may see a company pivot.

The Interface axis (how easy your product is to use) is your designer's primary responsibility. But because these three factors model together, designing an easy-to-use interface alone isn't enough to make a user engage.

It's very plausible to have an intuitive interface that falls on the wrong side of the engagement curve because the value proposition is low.

The tactical part is how you communicate the value proposition to your users. They need to immediately "get it". This is a critical component of user onboarding because it supplies the motivation for users to try your product and features, both at sign-up and over the course of their lifecycle.
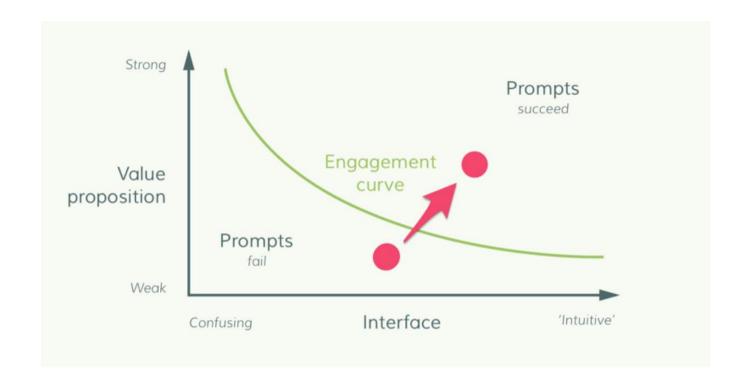
As you continue to grow, your product marketing team is responsible for delivering your tactical value proposition through prompts.

Prompts – what we traditionally think of as onboarding – are both reminders that users should be taking advantage of your product, and instructions on how to do it. A little prompting can make all the difference in engaging a user who might not know about a certain feature.

Nudging your users at the right time, in the right channel, with the right message, can drive them over the edge into the "success" zone on the BJ Fogg Model.

Onboarding efforts aren't merely instructional – they're also marketing tools.

Marketing used to be the process of convincing a customer to try a product. But now, where it takes so little effort to try out an app, the primary product marketing challenge is convincing a customer to keep using it. A good chunk of that convincing should take place inside your product, through effective prompts.

Each element of the BJ Fogg Model – interface, value proposition, and prompting – is integral to engaging your users. While most teams prioritize UI, the other two elements shouldn't be an afterthought.

Is your existing onboarding good? Here's how to evaluate it

10 questions to help you frame your thoughts

1. Do you know your users' motivations?

2. Are you clear about the main benefit they'll gain?

3. Can you demonstrate value before requesting work from a user?

4. Do you request only the most critical information needed?

5. Is there a clear, structured path for users to use your product?

6. Are you teaching users without overwhelming or boring them?

7. Is your teaching contextual and actionable?

8. Do users know what success looks like?

9. Do you engage users via other channels?

10. Are you refining and optimizing the process?

Not sure whether your existing user onboarding flow is optimized for the best results?

It's time to **assess your current state of onboarding** and make sure you provide the smoothest experience for your users, with the right messages at the right time.

Here are the **10 questions** to help you frame your thoughts as you go through the evaluation of your onboarding process.

1. Do you know your target users and their motivations?

Put yourself in your users' shoes and review the onboarding process from their perspective. Understand what motivates different user personas and evaluate the process for different user journeys. Are there any friction points? Any issues preventing users from completing the onboarding with ease?

2. Are you clear about the main benefit your users will gain from your product?

You need to deliver value as quickly as you can, in a very simple and easy-to-follow way. For this purpose, you should rank, in order of relevancy, the features your users will find the most beneficial and showcase these first. Remember, lead with the benefits your users will gain, not with the explanation of what the feature is.

3. Can you demonstrate value before requesting work from your users?

Think of onboarding like you would the start of a relationship. You don't want to be too forward and expose everything at once. Try giving a free demo or offering another form of value even before your users have to sign up.

4. Do you request only the most critical information from a user?

Stagger data requests over time. Make things easier by using pre-defined login options. Also, consider whether it's necessary to ask for a ton of information at the earliest stages. A user probably doesn't need to fill out complete profile information right when they sign up; they can do that later.

5. Is there a clear, structured path for users to use your product?

Don't force users to make decisions about "what's next" before they fully understand your interface and product. Let them know what the path looks like. Give them an overview and snapshot of the details. Start with showing them how to solve the key problems that brought them to your product in the first place.

6. Are you teaching your users without overwhelming or boring them?

Products are often feature-rich and it can be hard to decide what to showcase first. Again, place yourself in your users' shoes, and don't just assume your UI is intuitive. Doing so, you risk many users failing to discover key features. If different features apply to different user segments, craft a flow tailored to each segment.

7. Is your onboarding flow contextual and actionable?

Focus on what's both urgent and important for value realization from your users' perspective. People learn best when they are provided with information when and where they need it. Guide your users through a natural flow – start with the basics, and build on the learning in the most relevant way.

8. Do users know what success looks like?

Fill in empty fields with smart default data, offer an onboarding checklist so users can track their progress, and give positive feedback after successful user actions. Everyone likes to have a little validation that they're doing a good job!

9. Do you engage users via other channels?

Send users a personalized welcome email and encourage them to take follow-up actions. Don't make this email seem too salesy. Instead, thank your users for signing up, offer yourself as a resource for help, and suggest the next steps.

10. Are you refining and optimizing the process?

Think of your user onboarding as a gateway to your overall customer experience. Your onboarding should preclude a negative experience from the very beginning. You can run A/B tests and conduct user research sessions to identify what is working and what should be improved.

5 best practices to keep you on the right track

To help you achieve the goal of turning new users into fully engaged customers who've adopted your product into their lives, we've put together five best practices for onboarding, along with expert insights on how to implement them.

5 user onboarding best practices

- ✅ **Understand your users' needs**
- ✅ **Remove barriers to initial value**
- ✅ **Keep everything on-brand**
- ✅ **Create a multi-channel experience**
- ✅ **Tailor the experience to each user journey**

1. Understand your users' needs

Why do your customers need your product?

If you don't know the big "why" for existing users then you can't master the onboarding for new users. **Use in-product surveys** to understand what customers really get from the product, and build your user onboarding experience around that value.

To cater to your customers, you need to know:

- Who they are (e.g. their role)
- What they want (e.g. the metrics they care about)
- What pain they're experiencing that your product solves (e.g. why now)
- What tasks do they need to complete (e.g. what will make their job easier)
- What would stop them from using your product (e.g. what they consider risks)
- What could be the reason for leaving your product (e.g. where they got stuck)

On the other hand, you can **use a Customer Data Platform (CDP)** to collect customer data from multiple touchpoints and interactions and gather the information into unique customer profiles.

However, tracking anything and everything from so many different touchpoints, clicks, and events can lead to a low signal-to-noise ratio. That's why it's crucial for you to **understand what exactly you want to track.**

Geoffrey Keating, Senior Manager of Content Marketing at **Segment**, points out that the most successful teams start by creating a central list of events and relevant tracking plans.

> *"This central list of events will provide a consistent roadmap for what data is important, where it's being tracked, and why. To help you get started, our team has developed* **sample tracking plans** *for a variety of industries and use cases. In the end, your tracking plan can help you scale as you grow."*
>
> **– Geoffrey Keating, Senior Manager of Content Marketing at Segment**

Once you've got a grasp on these critical (but easy to overlook) details, you'll be able to better understand your user needs, motivations, and behavior. Then, you can treat user onboarding like a jigsaw puzzle, rather than a guessing game.

2. Remove barriers to initial value

"Aha! I totally get it. This is exactly what I need."

That's what you want your users to think as quickly as possible. To be able to identify the moment when they realize the value, the best way is to use a product analytics tool where you can track actions your users take.

Cassandra Gamm, Product Manager at **Mixpanel**, shares her advice on why tracking a **Value Moment** event is important.

> *"A Value Moment is a key user action that indicates that a user is able to generate or realize the value in your product, and is often a strong predictor of healthy user engagement and retention."*
>
> **– Cassandra Gamm, Product Manager at Mixpanel**

As she further explains, the Value Moment event should be tailored for your specific product, depending on the goals your users want to accomplish

"Tracking a Value Moment can help answer questions like:

- *What does active engagement look like? How many users are experiencing value in our product?*
- *What is our retention? How many people are coming back to realize value in our product?*
- *What is our activation rate? How many people who sign up make it to the Value Moment?"*

— Cassandra Gamm, Product Manager at Mixpanel

If you notice that users aren't getting to this realization quickly enough, you need to identify the barriers and remove them.

Here are a few tips on how to do it:

- Don't require account creation before trying the product
- Ask only for the most necessary information upfront
- Let users "try before they buy" with a free trial or a freemium model
- If you don't have a free trial, showcase the "aha!" moment on your website

If you're not sure where to start, **use the friction logging technique.**

Despite your users' motivation to take action, when product friction exists – you'll be working harder to get them to that "aha!" moment.

Documenting every step of the onboarding process will reveal the friction points and help you remove the barriers. The best part is that you don't need to start from scratch. Use **our friction logging template.**

3. Keep it on-brand

Would Mailchimp have as many diehard users without Freddie's high five that appears after every new campaign gets scheduled? Likely not.

You want your product to be like a work-buddy for your users – totally productive and brilliant, but also chill, funny, relatable, and [insert your brand adjectives here].

Just like branding can make your product stand out to your ideal target audience and get prospects to sign up in the first place, it can also be the factor that keeps them on board.

Your users are human, after all. They don't want just to achieve things, they want to feel good while doing it. By keeping your onboarding flows on-brand at all times, you'll help users relate to it immediately and realize value more quickly.

As **Kevin Wang**, SVP of Product at **Braze**, puts it:

> *"Ultimately, the strength of your brand is one of the fastest and most important motions of growth."*
>
> *– Kevin Wang, SVP of Product at Braze*

A best practice for user onboarding is to go all-in on branding and bring that brand to life immediately. Devote time and creative efforts to showcasing full value.

4. Create a multi-channel experience

To do this, evaluate what information you need to provide at which stage of the journey, and identify what would be the best channel for each touchpoint.

For example:

• Will you offer a demo video on your website and then a product walkthrough?
• Will the in-app guide be the first step and a webinar series will come later on?
• Will you offer tooltips for additional info, but also a rich library of help docs?

Ideally, the multi-channel user onboarding experience should be **as consistent and synchronized as possible.**

Let's go deeper into a few ideas.

Email: Your welcome emails for new signups should guide users towards the "aha!" moment and initially help them understand where they can turn for help. Later emails can provide additional resources to cater to many learning styles, and behavior-based emails can be used to reduce churn.

In-product guidance: This is essential. You want to pull users towards creating their first project or completing their first task. Are your users tech-savvy? You might just show them where core features are. Are they pressed for time? They might just want a quick tour and not a long guide.

Live chat: User onboarding isn't just something that happens in the first 10 minutes of usage. Providing users with a way to ask questions whenever they have them, be it immediately or 13 days into their 14-day trial, is critical to increasing retention.

Webinars: You can create "101" webinars to help new users understand how to use the product, or high-level webinars to enforce your brand authority and help push out content that brings in new users looking for thought-provoking content.

1:1 training: Demo request, anyone? Especially for complex B2B products, many users won't take the time to move their business processes over without a personalized demo showing them exactly why they should.

Knowledge base: Highly motivated new users will pour through your help docs to learn how to use your platform. But remember, user onboarding is a long-term process, and written documentation and help centers are very valuable for experienced, engaged users as well.

5. Tailor the experience to each user journey

Let's say user A and user B both sign up at the same time.

- **User A** needs your solution right away, so they immediately spend two hours completing a task.
- **User B**, however, has signed up with the intent to explore your product over the next couple of weeks.

How can you cater to such different needs? **Start with a multiple-button survey**. Ask users what they'd like to do with your product and engage them from there. The **choose-your-own-adventure user onboarding flow** can have a huge impact on users' success and your product adoption rates.

But tailoring the onboarding journey doesn't stop there. Here are a few more options to consider:

- After the initial welcome series, show additional tours based on user behavior, like feature engagement and task completion
- Consider a free trial that is project-based instead of time-based so you don't lose out on users who might be a great fit – just not right now
- Where in their journey are users most likely to upgrade? Create upselling and cross-selling campaigns by identifying the right segments and providing them with more product options when they are ready.

When you customize the experience and offer the right product add-ons to the right customers, you increase your revenue while increasing customer satisfaction and delivering greater value. This will also help you measure success more easily and implement improvements.

> 💡 **Pro Tip**
>
> For more creative ideas on how to personalize the onboarding experience to increase customer satisfaction and drive product adoption throughout customer journeys, visit our **Product Marketing Inspiration Gallery**. It's packed with excellent examples from the world-class SaaS companies.

How to measure the onboarding success

Treat user onboarding like an ongoing project and start tracking the performance of your flows.

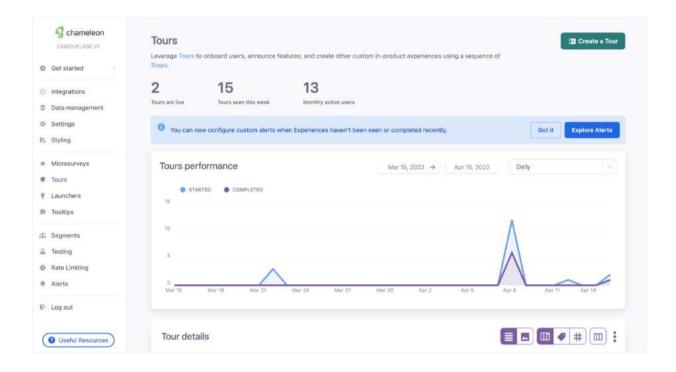Here are some of the important metrics to keep an eye on:

- Activation milestones completion rates
- Full onboarding completion rates
- A number of users who sign up
- A number of users who churn
- Major drop-off points
- Daily/monthly active users
- Customer retention rates

These metrics can vary depending on your product and onboarding flows, but it's important to commit to regular reviews and iterations.

For a quicker iteration, you can measure the correlation between a short-term metric (e.g. tour completion) and a longer-term goal (e.g. 90-day retention).

For example, **when you build Tours with Chameleon**, you can track their performance in the Dashboard. Here, you can see an example of it.

Key steps for measuring success:

✓ **Define the most relevant metrics**

✓ **Track the performance of flows**

✓ **Commit to regular reviews and iterations**

To go deeper into performance analysis, you can then integrate your data with a product analytics tool for more insights.

Claudiu Murariu, CEO and Co-Founder of [InnerTrends](#), shares his advice:

> *"On a high level, you need to understand how many users or accounts have started onboarding and how many have finalized it. Then you look deeper. You analyze the onboarding time, how accounts convert or drop off during the onboarding process, and what influences their behavior."*
>
> *– Claudiu Murariu, CEO and Co-Founder of InnerTrends*

Claudiu continues to explain the importance of analyzing metrics within a specific context and throughout different settings to get more accurate overview.

> *"For example, check the onboarding rate by traffic source. If there's a significant difference between organic and paid traffic, look at the expectations you are setting – your messaging might not be right."*
>
> *– Claudiu Murariu, CEO and Co-Founder of InnerTrends*

While the context of your business and the evolution of your metrics are crucial, here are some **benchmarks from InnerTrends' data** you can use as a reference point:

- 40-60% is a reasonable onboarding rate for B2B businesses running on a free trial or freemium model
- 30-50% is a good onboarding rate for B2C businesses

How to evaluate data and use it to make improvements? Here's how Claudiu Murariu suggests using data to understand which changes to make to improve onboarding.
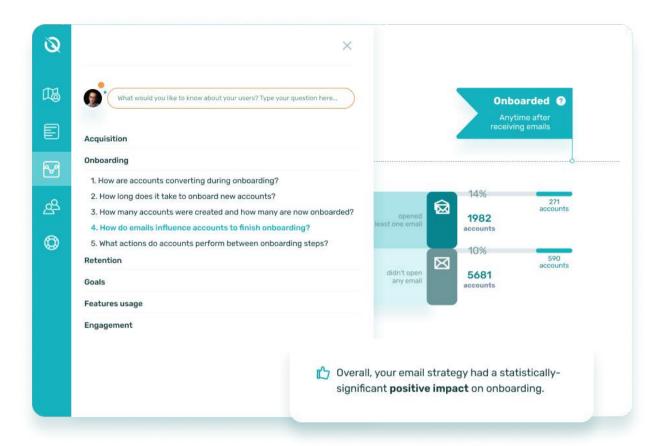
> *"Start from the big picture and narrow things down until you understand a problem to its root. Also, you should always focus on fixing the most significant issue, giving you the biggest impact."*
>
> *– Claudiu Murariu, CEO and Co-Founder of InnerTrends*

Since InnerTrends offers pre-built analytics reports, Claudiu Murariu suggests how you can make the most out of it.

- Start with the report **How are accounts converting during onboarding?** This clarifies if you have a top or bottom of the funnel problem. It also quickly highlights what onboarding step you should focus on fixing.

- Next, you can check **How long does it take to finish onboarding?** You can even drill down into the segment of users that finished onboarding fastest. Quite often, people complete onboarding in a different way than intended. The most successful segment can help you understand the differences.

- Then, go through the report on **What actions do accounts perform between onboarding steps?** This will show you actions specific to people who reach the next step and actions specific to people who abandon. You can also put in place automatic emails to target the users likely to drop off at this step.

- Connected to this last point, review **How are emails influencing accounts to finish the onboarding process?** You want to make sure that every email you send has a positive influence – users who open the emails typically convert better than those who don't.

InnerTrends - product analytics tool with pre-built reports

Depending on the results from your onboarding flows, start experimenting to improve the problematic areas. It can be something as simple as an A/B test of your product tour, or you can use advanced techniques like rate limiting, scheduling, optimizing for different languages, and more.

> *"Once all your experiments are done, redesign the onboarding experience by incorporating everything you learned. This approach never fails."*
>
> **– Claudiu Murariu, CEO and Co-Founder of InnerTrends**

6 quick wins for product-led onboarding

6 quick wins for product-led onboarding

- ✅ **Know your users**
- ✅ **Define the "aha!" moment**
- ✅ **Identify friction in the journey**
- ✅ **Focus on motivation first**
- ✅ **Offer signposting and nudges**
- ✅ **Create bumpers for drop-offs**

Giving your users the ability to onboard themselves to your product on their own is key to product-led growth. Of course, help is always at hand when needed. But lowering the barrier to adoption truly makes that "aha" moment come quicker.

The way **Kelly O'Connell**, VP of Product Strategy at **ActiveCampaign**, sees it:

> *"Your product becomes the core driver of acquisition, expansion, and retention."*
>
> *– Kelly O'Connell, VP of Product Strategy at ActiveCampaign*

Here are the quick wins you can apply to your product-led onboarding to make your users' life easier while making the product even 'stickier'.

Win #1: Know your users

Start with your users and put them in the center of your onboarding process. Who are they? Why do they care about your product? Why now? What do they expect?

These are only some of the questions to help you excel in onboarding personalization. Get some of this information based on behavior patterns you discover through analytics, or ask users directly during the sign-up process. Then, map out the user journeys throughout their lifecycle.

Are you serving different groups of users? **Adjust the steps, copy, and style** to suit their specific needs. The flow will be different for individual users, small teams, and enterprises, or for customers coming from completely different industries.

Making the onboarding flow instantly relatable to each of your user segments will help them internalize the value of your product without effort.

For each of the customer groups, start with these questions:

- What do new users need to know immediately?
- What resources will they need in a few weeks of active usage?
- What will they need to get the most out of the freemium plan?
- What will motivate them to upgrade to a premium plan?
- What resources will they need once they upgrade?
- What questions would they want to answer on their own?

> 💡 **Pro Tip**
> Play with different onboarding techniques for different user segments. Customize the experience as much as possible, and iterate until you make a perfect match.

Win #2: Define the "aha!" moment

For the best results from this quick win, **Wes Bush**, CEO and Founder of **ProductLed**, suggests starting with what the end user's success is.

> *"Once you understand a user's success, identify the starting point of their journey. Now, what does a meaningful first win look like?"*
> **– Wes Bush, CEO and Founder of ProductLed**

Here, Wes put together examples of what this would look like for different companies.

Company	End-user success	Starting point
Slack	Creating a better, more connected way to work.	Frustrated with slow communication internally.
Miro	Help remote teams get work done.	Presentation overload.
Zoom	Bring together teams.	Emails aren't cutting it anymore – nobody's on the same page.
ProductLed	Build successful product-led businesses.	What's PLG?

After understanding these two main points, it should be fairly easy for you to identify the "aha!" moment – that first win that will lead your users to move from their starting point towards their success.

One big mistake product teams make is trying to hand-hold new users through every single feature and aspect of the product. Don't do this!

Embrace the self-serve model and offer low-touch onboarding for users to explore on their own. This is especially important **when your product is the main lever for growth**. You want your users engaged and motivated, not exhausted from all of the information thrown at them.

That's why we highly recommend **creating several short, straightforward tours** than one long, comprehensive guide. As our [Benchmark Report](#) shows, three-step Tours have proven to be the most effective – with a 72% completion rate. On the other hand, seven-step Tours have completion of only 16%.

Win #3: Identify friction in the journey

Following up on the previous acknowledgments – at this point, **Wes Bush** advises to answer this question next: *What problems are your users going to encounter?*

Here's the example that Wes put together for what the answer would be for Slack.

Company	End-user success	Starting point	Problems
Slack	Creating a better, more connected way to work.	Frustrated with slow communication internally.	• Inviting a team • Messaging the team • Setting up channels • Sharing files • Searching for files • Paying for a product

By offering simple solutions for each of these problems and guiding users directly to accomplishing their goals – with the right guidance exactly when and where users need it — Slack helps its customers to move past the pain points.

That's exactly what you can do, too. **Get clear on what the pain points are**, and then double down on making sure your users can easily solve each of the smaller problems they encounter.

Get creative with your guidance. For example, you can use empty states to turn a moment of nothing into something. Instead of leaving it blank, use it constructively to teach, guide, educate, and prompt users towards their own success..

Win #4: Focus on motivation first

Onboarding users successfully is more than just explaining how they can use your product. Remember the BJ Fogg model? Without motivation and triggers, users won't act.

Focus on motivation first. Show social proof and examples of wins. Offer help when and where your users need it, with clear next steps – something that can be completed in a couple of minutes. Users will be proud of their accomplishments, no matter how small the task was.

Make sure to celebrate each completion with a highly engaging success message, and help your users to keep moving forward.

Don't neglect **the importance of clear and concise copy**. Avoid technical jargon in your onboarding flows, be specific and accurate, and stay timely and relevant.

> 💡 **Pro Tip**
>
> Craft a compelling message using 25 words per tour step, and you'll get yourself a tour that fits into the benchmarks as the most effective. For more insights into the in-product experiences benchmark data, **download our latest Benchmark Report**.

Win #5: Offer signposting and nudges

In-product messaging is the key channel for product-led onboarding. Your job here is to communicate clearly, make smooth transitions, and navigate users from end to end. One step at a time.

Your goal is to encourage every user, make them feel comfortable, and put off any doubts they may have. For this, make sure to **use signpost language** to explain what has just happened, and what is going to happen next.

Instead of longer tours, you can use single-step pointers to simplify the flow. Make sure to customize them to your brand style and make them stand out.

To offer additional help and relevant resources, use in-app widgets and link to existing help articles from within. Keep users engaged and help them understand your product better. They won't become product fans overnight, but each step in that direction is important.
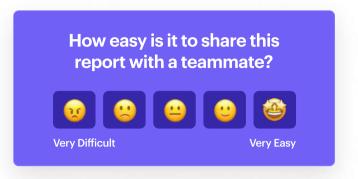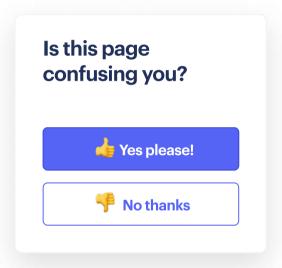
Win #6: Create bumpers for drop-offs

Have you noticed some breaking points in your onboarding flow, moments when major drop-offs happen? Make sure to address that issues and fix them.
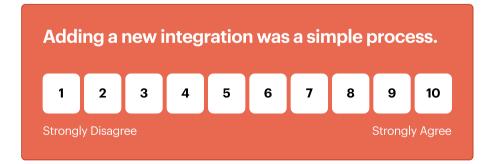
This is where a multi-channel approach is useful. **Wes Bush** suggests using email as an effective channel to nudge users back into your product.

> • *Have emails that help beginners see value beyond your product*
> • *Have trigger-based emails that go out if users don't get to the "aha!" moment and offer them clear next steps to complete it*
> • *Have an exit-intent email that learns from the experience*
>
> *— Wes Bush, CEO and Founder of ProductLed*

To learn from the experience, you can **use simple surveys to ask users for feedback** – especially their concerns and expectations. This will help you understand why drop-offs are happening and you'll be able to prevent them.

How easy is it to share this report with a teammate?

😠 🙁 😐 🙂 🤩

Very Difficult   Very Easy

Is this page confusing you?

👍 Yes please!

👎 No thanks

Adding a new integration was a simple process.

1 2 3 4 5 6 7 8 9 10

Strongly Disagree   Strongly Agree

Your tech stack for multi-channel onboarding

Your multi-channel onboarding tech stack

Proof
Pre-signup user onboarding

Chameleon
In-product user onboarding

ActiveCampaign
Omni-channel onboarding

Demio
Video webinar onboarding

Freshpaint
Hybrid data collection

Braze
Customer-centric interactions

Customer.io
Automated messaging flows

FullStory
User experience analytics

Hotjar
User interaction insights

Segment
Customer profiling

InnerTrends
Pre-built analytics reports

Mixpanel
User behavior dashboards

Amplitude
Product Intelligence

Heap
Retrospective event tracking

Maze
Product research platform

Users understand that there will be a learning curve to your product, but if that curve is too steep, all motivation goes out the window.

We want your onboarding experience to be as smooth as an extra sip of wine and as sweet as a well-deserved slice of cake. So we've collected 15 tools you can add to your tech stack to streamline the onboarding flow – from pre-sign up to reporting.

1. Proof: Pre-signup user onboarding

Add **Proof** to your marketing funnel to build trust, create urgency, and increase your website conversions. You can integrate data from your tech stack, build custom pages depending on audiences, and get personal with how you speak to potential customers.

2. Chameleon: In-product user onboarding

Chameleon helps you drive product success with in-product experiences. Use banners, modals, hotspots, and more to provide easy-running **Tours**. When a user needs more information, offer **Tooltips** as tiny but powerful in-app messages. Build customizable **Launchers** as bite-sized snippets of information that deepen user engagement and feature discovery. Collect contextual, continuous feedback with **Microsurveys** to get valuable insights on your onboarding flows and product engagement.

3. ActiveCampaign: Omni-channel user onboarding

ActiveCampaign is the Swiss Roll of user onboarding tools. It takes your email marketing, marketing automation, CRM, and support platforms under one roof, rolls them all together, and creates the sweetest of recipes for user onboarding that's inclusive and aware of the content your users are receiving.

4. Demio: Video webinar onboarding

Demio offers a user-onboarding webinar experience entirely in a web browser. You can run recurring customer success webinars, one-on-one sessions with users, or host on-demand webinars where you can engage with customers in real-time and help solve their problems – taking the heavy lifting out of user onboarding.

5. Freshpaint: Hybrid data collection

Use **Freshpaint** to better understand your users' behavior. It collects, organizes, and archives behavioral data automatically, so you can easily access historical data even if you didn't set the tracking up front. You can then integrate and unify customer data across all your analytics and marketing tools.

6. Braze: Customer-centric interactions

As a customer engagement platform, **Braze** enables you to shape customer-centric interactions and drive growth. Use it to build dynamic audiences, deploy customer journeys, and create personalized flows – all that with a drag-and-drop interface.

7. Customer.io: Automated messaging flows

Customer.io offers you flexibility with cross-channel messaging campaigns. You can automatically trigger one-time emails, welcome sequences, or drip campaigns based on the user behavior. For example, you can **integrate with Chameleon** and coordinate email campaigns with product tours. Show users what they need, when they need it, and increase your onboarding, engagement, and adoption rates.

8. FullStory: User experience analytics

FullStory offers powerful user experience analytics, enabling you to build on informed data decisions. You'll understand and improve conversions, identify and prioritize points of friction, increase collaboration, and debug faster. FullStory integrates with most user onboarding tools out there (**Chameleon is one of them** 😉), enriching your tech stack and allowing you to continuously discover new user needs.

9. Hotjar: User interaction insights

Hotjar is like an apple strudel on a winter's day. Reliable, simple, and incredibly satisfying. Hotjar serves you a number of ways for how people interact with your product. It takes it a step further and shows their actions, too. Using a collection of heatmaps, screen recordings, surveys, and incoming feedback, you'll determine if your user onboarding experience is as intuitive as you initially thought it was.

10. Segment: Customer profiling

With **Segment,** you can collect customer data using simple analytics APIs. You'll be able to align teams on how users are onboarding to your platform while remaining conscious of their data privacy. In the end, you'll get clear customer profiles and generate ideas on how you can engage them better in the onboarding process. Integrate Segment with your other tools (**it works seamlessly with Chameleon**) for a broader range of onboarding insights.

11. InnerTrends: Product analytics with pre-built reports

Designed by SaaS growth experts, and built by data scientists, InnerTrends offers pre-built analytics reports so you can easily identify problematic onboarding steps, track user engagement rates, understand the impact of your initiatives across the customer journey, and more. Find out how users interact with your product and get the insights you need to accelerate growth.

12. Mixpanel: User behavior dashboards

Mixpanel provides insightful, engaging, and enjoyable product analytics dashboards on your user behavior. Answer just about any query you have and build out dashboards and workflows to get answers you can act on. If you use Chameleon as your onboarding tool, you can then combine data from Mixpanel and Chameleon to iterate more quickly and improve your onboarding experience.

13. Amplitude: Product intelligence

Understand your users and improve their in-product experience. Amplitude will give you the user behavior data you need to increase their lifetime value. To analyze your onboarding tours more deeply, you can integrate Amplitude with Chameleon.

14. Heap: Retrospective event tracking

Heap helps you measure the success of your onboarding even if you haven't decided upfront which metrics and events you want to track. It offers retrospective tracking, meaning it will track everything in the background, so once you decide what's important for you, you can access historic data for a complete overview. You can also leverage the integration between Heap and Chameleon to get even more insights.

15. Maze: Product research platform

Maze enables you to run product research with authentic audiences online. Why do you need this for your product development? Before you launch, you can collect insights on your designs, prototypes, or concepts with usability tests, card sorts, preference tests, five-second tests, and more. With Maze, you'll be able to deliver user experiences that are a hit from day one – optimizing now, rather than later.

DIY: Build your own onboarding solution

If you have the people power, time, and other resources available, you can run a DIY project and build the onboarding software in-house.

Custom development can be the best solution for you if you need to solve a complex onboarding problem within the specific context of your company. This will set you on a different path than the evaluation of SaaS tools, in terms of further steps to take, options to consider, and evaluations to make.
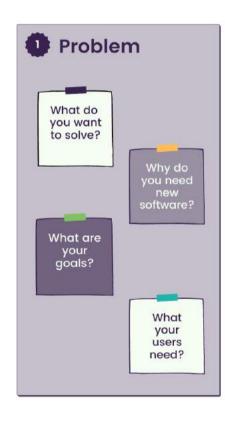
If you decide to build software in-house, you'll need to assess the current state in your company. Is your development team ready for it? Do your engineers have the right skills? When can you expect to get a fully functional system?
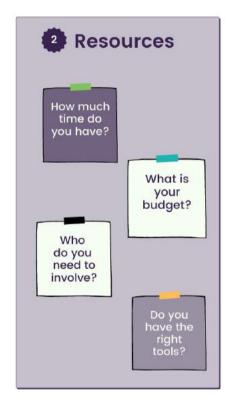
Before you begin, make sure to have a clear understanding of the **three key factors** that will influence your decision – the problem you want to solve, the resources you'll need, and the overall cost of the project.
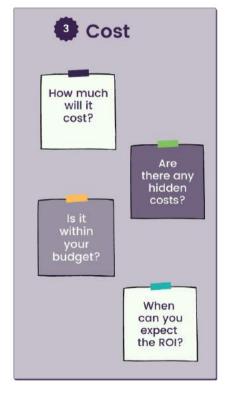
If you're not sure whether to build or buy your onboarding software, we've put together a detailed guide to help you decide with confidence. You can start with this brainstorming template.

Build vs. Buy: How to decide

Three key factors to consider and questions to ask

1 Problem
- What do you want to solve?
- Why do you need new software?
- What are your goals?
- What your users need?

2 Resources
- How much time do you have?
- What is your budget?
- Who do you need to involve?
- Do you have the right tools?

3 Cost
- How much will it cost?
- Are there any hidden costs?
- Is it within your budget?
- When can you expect the ROI?

User onboarding checklists to avoid any mistakes

Your onboarding flow: From concept to launch
(A checklist from your point of view)

- [ ] Map out the user journey for each of your user personas
- [ ] Showcase the "aha!" moment as quickly as possible
- [ ] Identify the friction points and remove the barriers
- [ ] Craft the timely and relevant product guides
- [ ] Tailor the onboarding flows to different user journeys
- [ ] Launch the flows and track the core performance metrics
- [ ] Analyze the results, iterate and improve accordingly

Users onboarded: From signup to activation
(A checklist from your users' point of view)

- [ ] The sign-up process is smooth and simple
- [ ] The account activation steps are clear
- [ ] The in-product guides are relevant and useful
- [ ] The copy is short and easily understandable
- [ ] There's an option to leave the flow and come back
- [ ] There's additional information when and where needed
- [ ] The value is clear: *"Aha! This is exactly what I need!"*

Your onboarding resources cheatsheet

Your onboarding resources cheatsheet

How to identify the "aha!" moment?

The "aha!" moment is the goal of any great user onboarding flow! Learn how to find yours and keep users around for longer.

🔗 **Unlock successful user onboarding**

Build a habit-forming product

Nir Eyal's book Hooked completely changed the way people think about creating viral products. Find out how to apply his Hook Model to your onboarding flows.

🔗 **Hook users from the get-go**

Use qualitative research to improve onboarding

By regularly collecting qualitative data, you're constantly engaging with your customer. And, by engaging with your customers, you're ensuring product-market fit at all levels.

🔗 **Apply qualitative methods to your flows**

Fake door testing is risky...

...but when done right, you can better understand user needs, discover pain points, and win future customers. We explain how to run these tests effectively to help product-led growth while building trust.

🔗 **Build functional fake door tests**

For better onboarding, switch to product marketing

Design your user onboarding flows with a focus on marketing the core value of your product. It should be consistent with your product positioning, and you may even want your Product Marketing team to own it.

🔗 **Make the switch**

Onboard users with clear in-app messages

In-app messaging is a delicate matter. Treat it with great care because it can easily make or break the user experience. Think of it as a conversation with your users and a powerful tool for activation and onboarding.

🔗 **Master in-app messaging**

First-time user experience is essential for success

User onboarding is more than just a first-time user experience, but the first experience is one of the most critical points for product adoption. If the UX is bad, the majority of new users will drop off. Don't let that happen!

🔗 **Improve the first-time user experience**

8 guiding principles for SaaS onboarding

There is no set-in-stone collection of onboarding guidelines – your onboarding experience should be unique to your product. There are, however, some guiding principles you should keep in mind, ranging from clarity and transparency to accessibility and continuity.

🔗 **Follow the guiding principles**

Conclusion

Guide your users to success

As behavioral scientist BJ Fogg suggests, you need to provide the **necessary motivation, sufficient ability, and effective triggers** to onboard users with ease and help them achieve success with your product.

While you manage a lot of moving pieces of user onboarding, remember this: it's not only about intuitive design and first-time experience.

User onboarding is the system of actively guiding users to find new value in your product. It begins before a user signs up and extends throughout the their journey within your product.

By prompting users with the right content, in the right channel, at the right time, you'll offer a smooth-as-a-butter experience and enable them to progress from *preview users* to *power users*.

The final goal of each onboarding flow is the same – **drive users to the "aha!" moment** and help them quickly realize the value.

Use different tools and techniques for a holistic approach, track the performance of your flows, measure the success, and hit the ground running with experiments and improvements to see those activation, adoption, and retention rates go up.

Here's to your user onboarding success!

About Chameleon

Chameleon is a digital adoption platform – a software that helps product teams and SaaS businesses alike to offer structural guidance to their users with easy-to-build, customizable in-product widgets.

You can use it to create **Tours, Tooltips, Launchers, and Microsurveys** to gather contextual customer feedback and enable your users to learn how to use your product while keeping them in the know about new features, updates, redesigns, and every new layer of added value.

Want to increase your possibilities of user onboarding success with effective in-app messaging and strong self-serve support?

Start for free

Get a Demo

Offer in-line help
Provide contextual information.

Announce a redesign
Use modals for major announcements.

Promote a new post
Boost customer marketing.

Highlight a feature
Bring attention to a specific element.

Gather feedback
Continuously learn about users.

List onboarding tasks
Use checklists for onboarding.