

STRATEGIES FOR ONBOARDING AND ENGAGEMENT



TABLE OF CONTENTS

6	Your Guide to Onboarding Methods
7	Short Term - Activate
8	METHOD #1: Interactive Onboarding Tour
11	METHOD #2: Empty States
14	Mid Term - Engage
15	METHOD #1: Chat & Chatbots
16	METHOD #2: Task Lists
18	METHOD #3: Gamification
19	Long Term - Support
20	METHOD #1: Contextual Tour/Instructional Videos
22	METHOD #2: Email Tutorial Campaign
23	METHOD #3: Support Library
25	What Approach to Onboarding is Right for Your Users?
26	Recommended Third-Party Tools

DISTINGUISH YOUR APPLICATION WITH ONBOARDING

Similar to onboarding an employee at a new job – where they learn the ropes of their company’s procedures and expectations – digital onboarding is about helping a new user learn the ropes of an application. Onboarding is a broad topic that covers a variety of approaches.

It’s important to understand that whatever your goal is, user onboarding is critical in creating a successful application.

If your application launches but users don’t intuitively know how to use it, you’re immediately placed behind the curve. According to [Statista](#), that curve is steep and competitive. There are currently 2.8 million apps on Google Play and 2.2 million apps on the App Store, and that’s just speaking for native apps, not web apps. Suffice it to say, the market for applications is filled with competition.

[Smashing Magazine found that](#): “90% of all downloaded apps are used only once and then eventually deleted by users. People often abandon apps because of a poorly designed interface or an overall negative experience. Instead of having their problem solved by the app, people get confused trying to wade through a jungle of screens, menus and buttons.”

So, in a competitive market with millions of applications, how do you avoid being one of the 90% that users try once and delete?

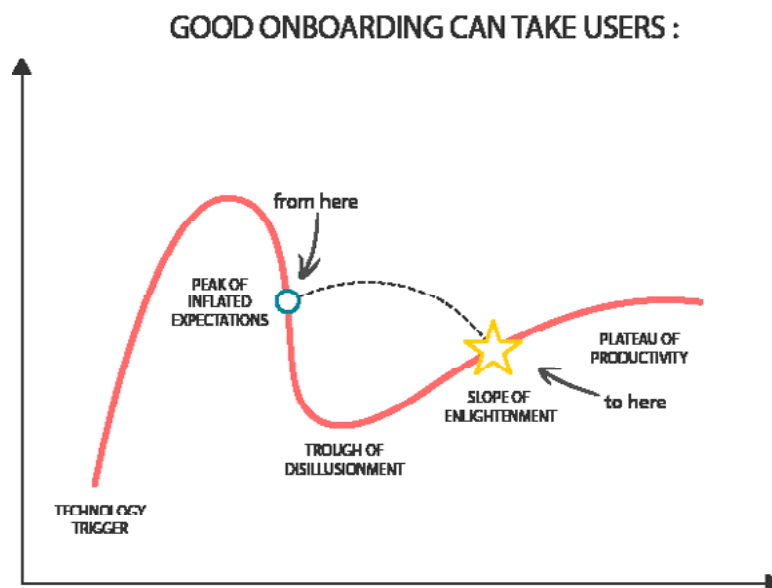


Create a Positive First Impression to Convert Users and Build Loyalty

Users often make up their mind about whether they want to keep or delete an app within a few seconds. A high-end onboarding experience can create a positive first impression with users.

Too often, the emphasis is placed on training or teaching users how to use the application after they've begun handling it. At that point, you may have already lost their attention.

Managing the “churn rate” of existing users – the measurement of the number of individuals who leave your group of users over a period of time – is useful. But tackling churn proactively by converting trial users and building long-term loyalty via a positive first impression yields far more ROI.



Bypass Disillusionment and Enlighten Users with Onboarding

The Gartner Hype Cycle outlines the phases of a technology's life cycle. From inflated expectations (generally held by early adopters) to the trough of disillusionment (realizing that the value proposition fails to deliver), users can be lost. So how do you bypass disillusionment all together?

A great onboarding experience can allow you to do so, helping users overcome points of frustration or disappointing functionality, as abandonment often comes after users experience high expectations, then are let down with an experience that doesn't follow through on its promise.

Create an Onboarding Plan to Set Your Application Apart

In this paper, we'll cover:

1. Short-, medium-, and long-term onboarding strategies
2. Different methods for each phase, along with examples
3. A sample onboarding plan
4. Recommended third-party onboarding tools

While onboarding might seem an added expense or an unnecessary constraint, we view it as being an integral component of a high-end user experience. Onboarding is scalable depending on your resources and unique needs. It's not a one-size-fits-all strategy and can be scaled in light of your budget or the scope of your application.



YOUR GUIDE TO ONBOARDING METHODS

In the following sections, we'll discuss methods that can be used in the short, medium, and long term as your application grows in both adoption and complexity. Keep in mind that, depending on your user's needs, introducing instructional videos in the short term (which we typically view as a long-term strategy given the time and effort needed to do video work) might be necessary for your application.

The key is defining a strategy in the short, medium, and long term that works for you and sticking to it, while understanding that adaptability is key. Just like you plan out your larger vision for your application ahead of time, you should be striving to do the same when you design your onboarding plan.

View the recommendations we provide as a starting point, not as a hard and fast set of rules. With an overview of the approaches available, you can structure your own strategy.

SHORT TERM (ACTIVATE)



Focus:

1. Improve Onboarding
2. Increase Engagement and Stickiness
3. Improve Support

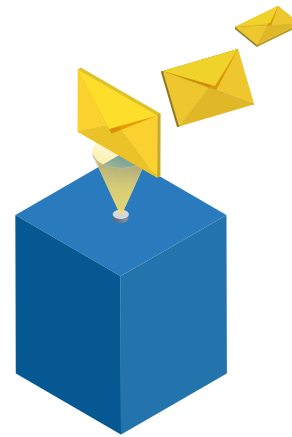
MEDIUM TERM (ENGAGE)



Focus:

1. Improve Virality
2. Improve Sharing
3. Maintain Onboarding and Support

LONG TERM (SUPPORT)



Focus:

1. Retain Long-term Users
2. Continued Onboarding and Support

SHORT TERM: ACTIVATE

In the short term, we recommend prioritizing the activation of users. While activation starts when you begin advertising your application and users first hear about it, activation also refers to when users download your application, sign up, and use it for the first time.

Activation looks different for different apps. For Slack, activation might mean downloading it the desktop app, signing up, and sending a message. For Pinterest, it might mean signing up online and creating a board.

You can begin engaging users as they dive into the app and complete basic onboarding workflows. By doing this, you increase product stickiness, which increases activation, and thus increases your chance of converting users long term.

Focus:

1. Improve Onboarding,
2. Increase Engagement and Stickiness
3. Improve Support

**Short-Term
Onboarding,
Focused on
Activation**

- Interactive Onboarding Tours
- Empty States

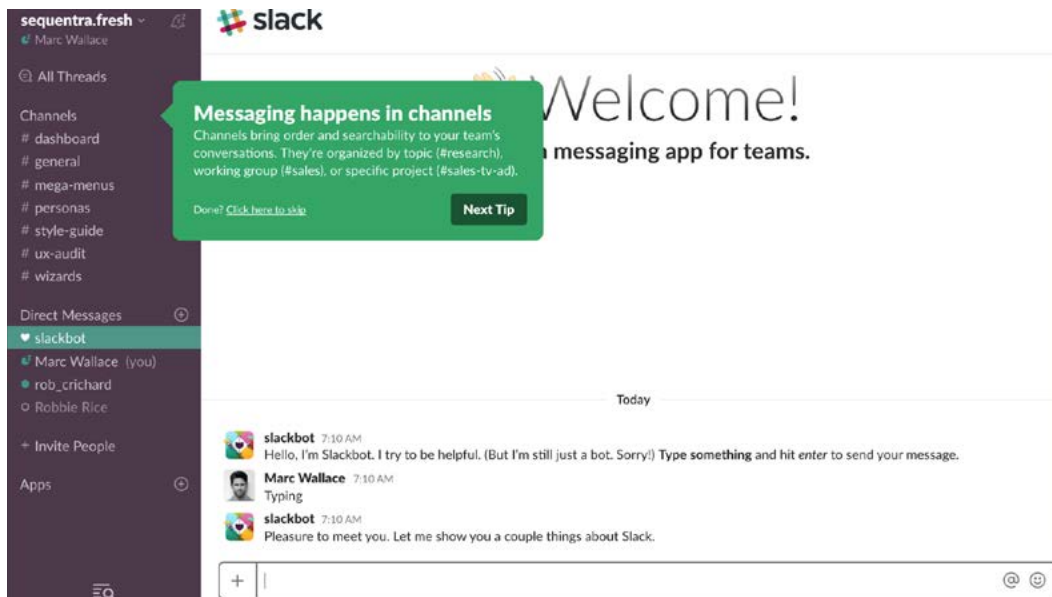


METHOD #1: INTERACTIVE ONBOARDING TOUR

A tour wizard is a tutorial that instructs users about what features and functionality they should be aware of. While holding the user's hand initially, a tour wizard allows users to learn in context. This could involve filling out information or setting up a dashboard which will continue to be used after they sign up. To incentivize completing the entire wizard, some apps provide a percentage/completion tracker to show users how they have progressed (50%, 75%, or 100%).

Example: Slack

A user-friendly, personable approach introduces users to Slack, with informative, conversational copy. Users have the option to skip the tutorial, but are given a route to learning about functionality from the very first screen.

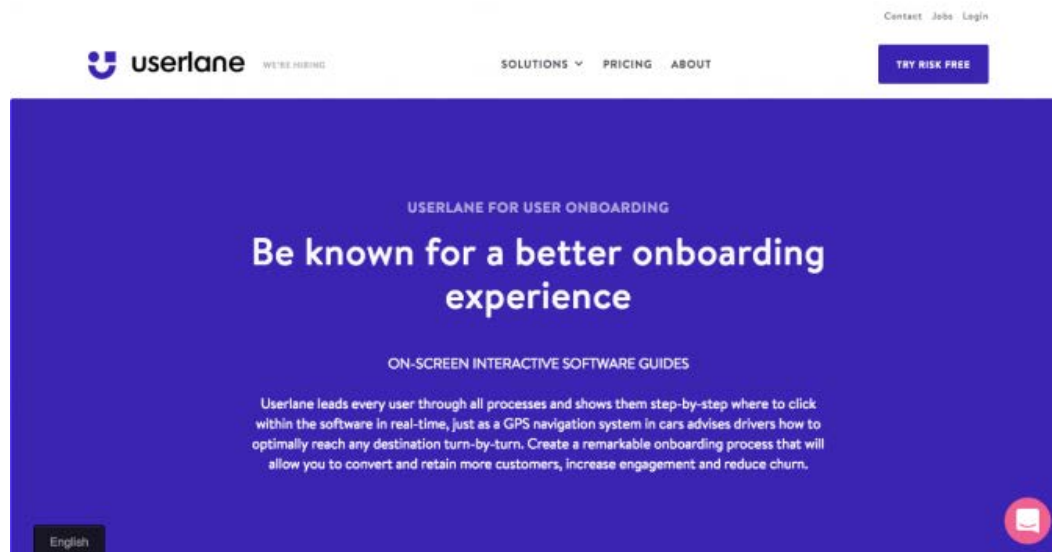


Another component of Slack's approach to onboarding is tooltips, which are also typically included in an interactive onboarding tour.

Tooltips provide bite-sized instructions that allow users to understand basic functionality within the application, helping them to learn in context. Tooltips should provide clear headlines, informative copy, the option to skip, and the option to view another tip (if applicable).

Tooltips – color coded depending on the tier of navigation in the sidebar – give users guidance, with the option for users to bypass tips or progress to the next tip with a simple click.

Recommended Third-Party Tool – [Userlane](#): If building your own custom interactive onboarding experience isn't possible, consider [Userlane](#), a third-party integration that takes a few minutes and one line of code to implement.



Userlane “leads every user through all processes and shows them step-by-step where to click within the software in real-time, just as a GPS navigation system in cars advises drivers how to optimally reach any destination turn-by-turn.”

METHOD #2: Empty States

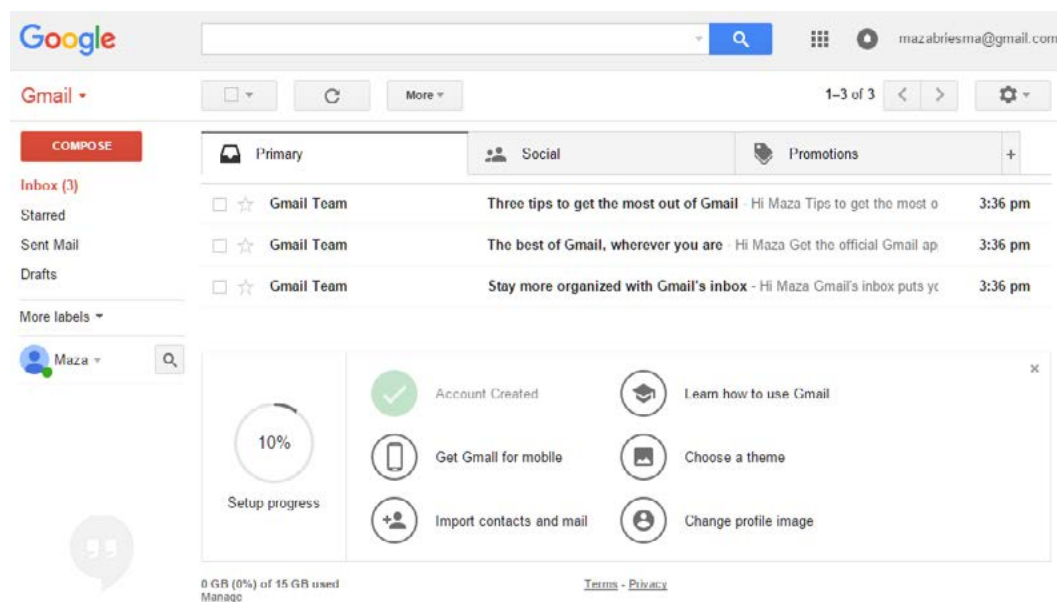
When including a dashboard or screen that users will fill with their own data, including empty states allows them to see how that will look within the application. Some applications fill empty states with the user's data as they sign up or enter basic information. This approach allows users to dive in and begin using the application while gradually learning important functionality.

There are three steps to think about when creating empty states.

Step #1 – Educate: Show or tell the user what the screen will look like when it's populated with data. Use fake, relevant, or tailored sample data. Showing what a partially completed or finished product looks like sets expectations and generates excitement about getting started.

Example: Gmail

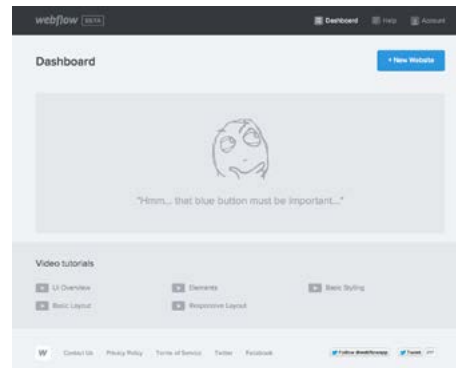
Instead of showing you an empty inbox, Gmail populates it with three emails. This educates the user about how emails will appear in their inbox – a subject, a teaser of the email content, and a time stamp. It also provides a list of steps that the user can complete, which we'll discuss more in a later method.



Step #2 – Delight: Every detail you include in the empty state counts in convincing the user to give your product a fair chance. A good first impression isn't just about usability – it's also about personality. Can you add something fresh or unexpected? Can you make the user crack a smile, or give them a taste of the brand experience?

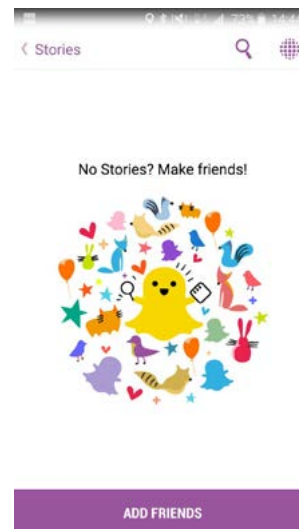
Example: [Webflow](#)

Webflow is a tool used for creating high-end website prototypes – it gives users a clear instruction when they reach the empty dashboard: click the blue button to create a new website. Their approach is comical, and provides a personal touch.



Example: [Snapchat](#)

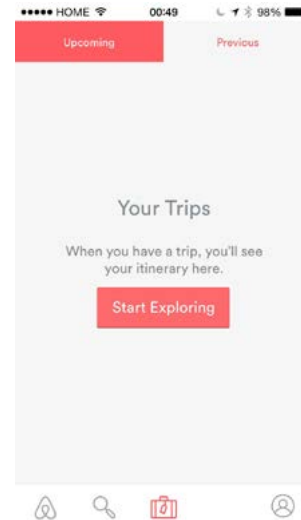
Snapchat is a creative multimedia messaging app. In a delightful way, the app gives users a clue about how to add friends in order to populate their feed with Stories, one of the key features of the app



Step #3 – Prompt Action: A successful screen will explain a specific feature, reiterate the value proposition of that feature, and then compel the user to take the next step. This is where you can motivate, persuade, and direct users to get started by signing up, installing your application, or completing another important action.

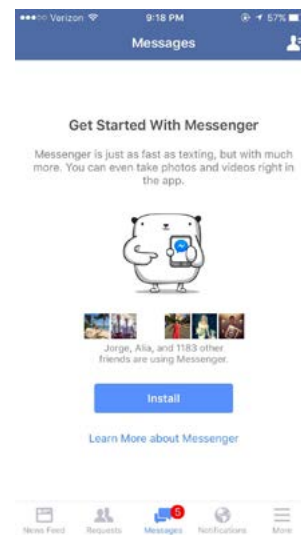
Example: Airbnb

Airbnb encourages the user to click the CTA “Start Exploring” so that they engage in the application and look for trips.



Example: Facebook Messenger

Facebook Messenger encourages users to install the application in order to take advantage of communicating with other Facebook users.



MID TERM: ENGAGE

When the goal is mid term, we recommend prioritizing onboarding methods that engage users. Engagement refers to ongoing use of the application, rather than trying it once and deleting it. Because different applications have different usage patterns – some are used daily, others are used monthly – you’ll need to define your own parameters for what an “engaged user” looks like.

The key with engagement is continuing to generate interest as you release features and functionality, rather than making users feel alienated. Engaged users are also more likely to share or rate their experience, which is an added bonus and can lead to the activation of additional users.

Focus:

1. Improve Virality
2. Improve Sharing
3. Maintain Onboarding and Support

**Mid-Term
Onboarding,
Focused on
Activation**

- Chat and Chatbots
- Task List
- Gamification



METHOD #1: Chat & Chatbots

An interface that speaks to the user can provide a personal touch, but creating an interface that does so can be a challenge (we'll discuss a third-party tool that can allow you to integrate chat effectively below).

Chat – which is also typically automated – can engage users before they even get to a sign up screen. Though different than the utility that Chatbots provide, chat still serves the purpose of engaging users. Chatbots – computer programs that converse with human users inside an application or on a website – serve to moderate sessions, adding guidance to users. These two onboarding elements can give your application personality, which can be a key factor in maintaining that positive first impression.

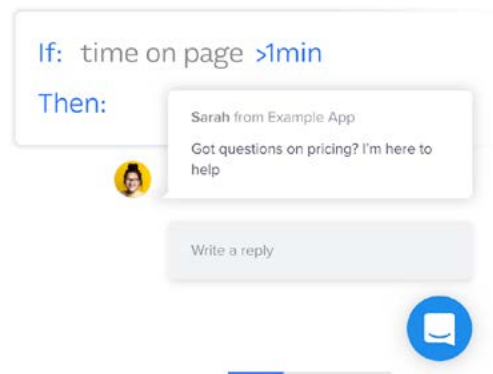
Example: Slack

Slack provides a chatbot – known as “Slackbot” – that greets new users and introduces them to key features and functionality. While the user can go to the Help Center for more information, they can also type a query into the field, sending a direct message to Slackbot. Then, Slackbot will search the Help Center for relevant articles and information.



Example: Intercom

[Intercom](#) is a third-party tool that can be used to facilitate chat. Intercom is great for building ongoing, long-term engagement. The Query Builder tool, shown below, allows a developer to use code to send targeted messages to the user as they engage with the application.



Scenarios where Intercom would be a useful third-party integration for Chat include:

- Providing in-context help.
- Prompting an automatic message after a specific amount of time a user has been viewing a specific screen.
- Giving users guides, links, videos to how-to guides on how to do things, at a specific phase of the user's engagement with your app.

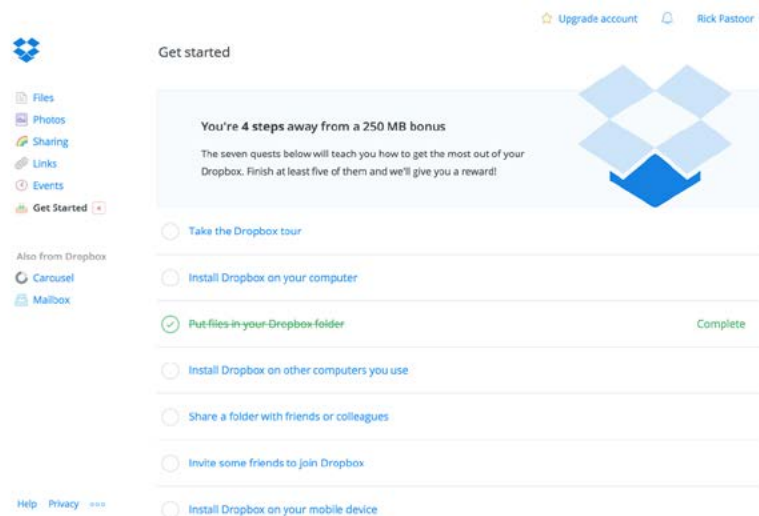
METHOD #2: Task Lists

There's nothing quite as satisfying as checking off all the items on your To-Do List. [Research shows that “Cognitive Closure”](#) – of striking finished tasks off a To-Do List so that your brain can focus on tasks that aren't finished – is motivating. The same logic extends to onboarding.

A task list, which can be included at the outset and reintroduced as additional features are included, allows users to monitor their own progress as they're using the application. Each task introduces bite-sized functionality which allows the user to learn the interface piece-by-piece. Not only does a checklist allow users to complete meaningful work, but it also provides an opportunity for them to track their own progress in learning how to use the app.

As you design your task list, consider the following recommendations from the Nickelled article titled [“Five Psychological Hacks That Will Transform Your Onboarding Experience”](#):

1. Offer an easily-accessible onboarding “checklist” which users can complete at their own pace
2. Don't start progress bars at zero - start them at 20% or so to create the illusion that progress has already been made
3. Put the easiest steps at the beginning and the hardest ones at the end of your onboarding program



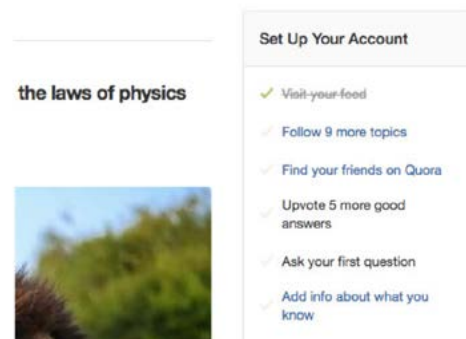
Example: LinkedIn

For completing different parts of their LinkedIn profile, users earn % toward 100% completion. This provides incentive, and users can learn more about why they should be completing their profile if desired. As is suggested above, users don't start at 0% – just by signing up, they've already begun filling out their profile. By importing their resume, the percentage will be even higher. This technique plays into the psychological hack of creating the illusion that progress has already been made.



Example: Quora

Quora provides a simple, traditional checklist. Quora relies on community generated content, so cluing users into the functionality unique to Quora is important. These important workflows include following, finding friends, upvoting answers, and generating questions.



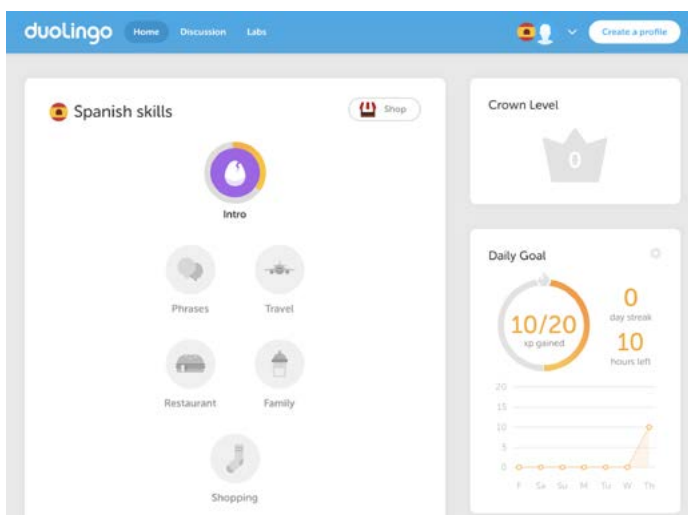
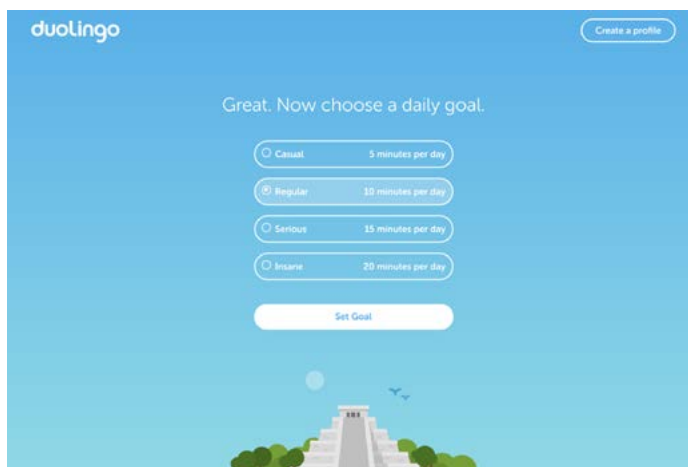
METHOD #3: Gamification

Gamification is defined as “the application of typical elements of game playing (e.g., point scoring, competition with others, rules of play) to other areas of activity.”

Some of the principles of games – awards, badges, recognition – are provided in apps as well. Dropbox, mentioned above, is a loose example of rewarding users with something for completing onboarding, but there are more literal examples as well. In some cases, onboarding is turned into an actual game that’s baked into the experience.

Example: Duolingo

Duolingo is a web application that allows users to practice basic skills and learn new languages. Duolingo’s initial screen, after selecting Spanish, looks like an animated world that user is compelled to explore and discover.



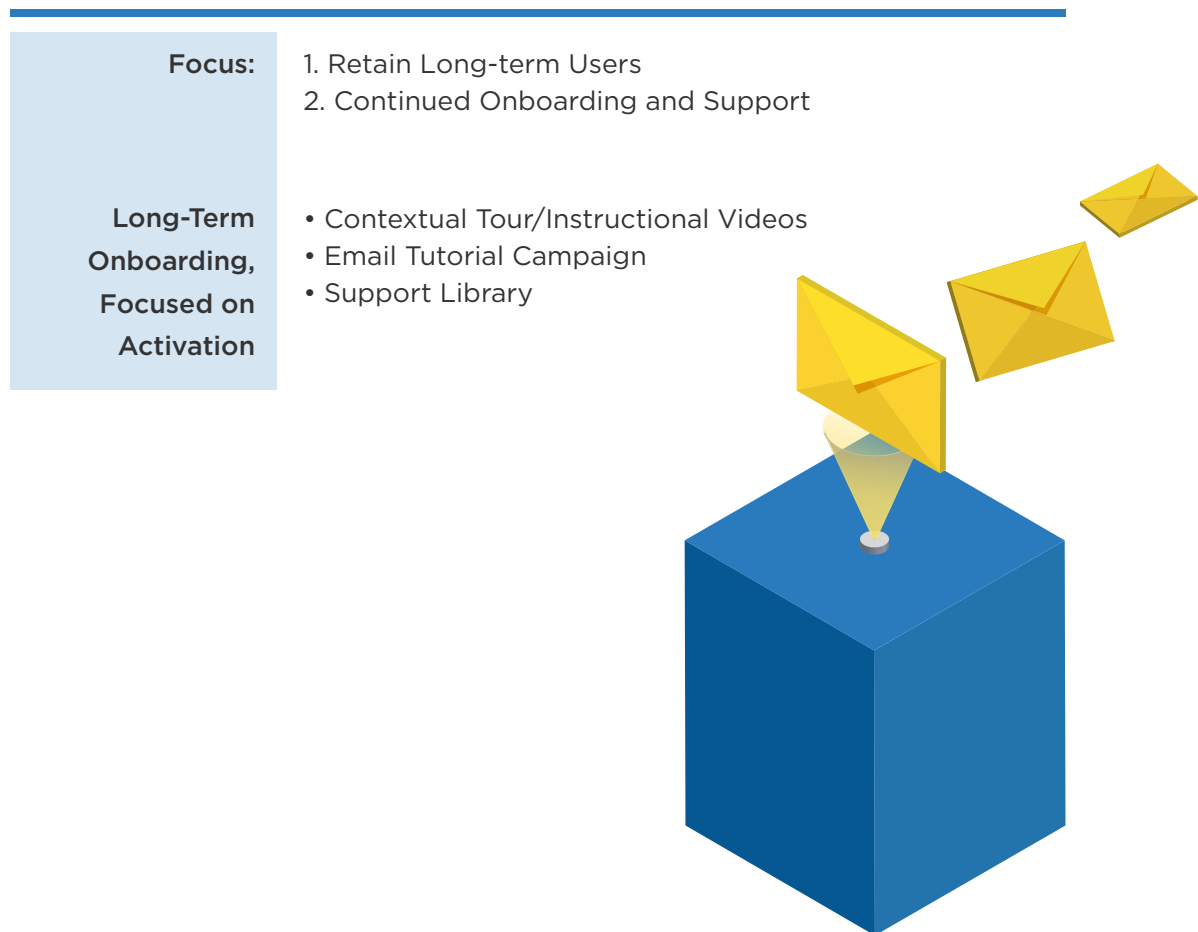
The “gaming” experience continues. At no point are there long, extensive instructions. Duolingo provides a tutorial that allows users to jump into the action, testing the user’s prior knowledge of a language. “Tests” are an important part of the application, so by completing one initially, the user is introduced to a key feature and can also earn progress toward mastering skills.

LONG TERM: SUPPORT

When the goal is long term, we recommend prioritizing ongoing onboarding initiatives to support users. At this point, you've gotten users to download your app, sign up, and begin using it. Now that you've captured their attention, you can focus on building loyalty.

Note that support also comes at the short- and mid-term levels, but long-term methods typically involve more effort (e.g. creating a robust help center akin to what Salesforce offers), which might not be feasible short term. Additionally, if you unveil a huge Help Center from the outset, users might become overwhelmed and search for a simpler alternative.

Long-term support typically corresponds to long-term retention. The overarching goal is to increase the loyalty of existing customers through added features, functionality, and help.



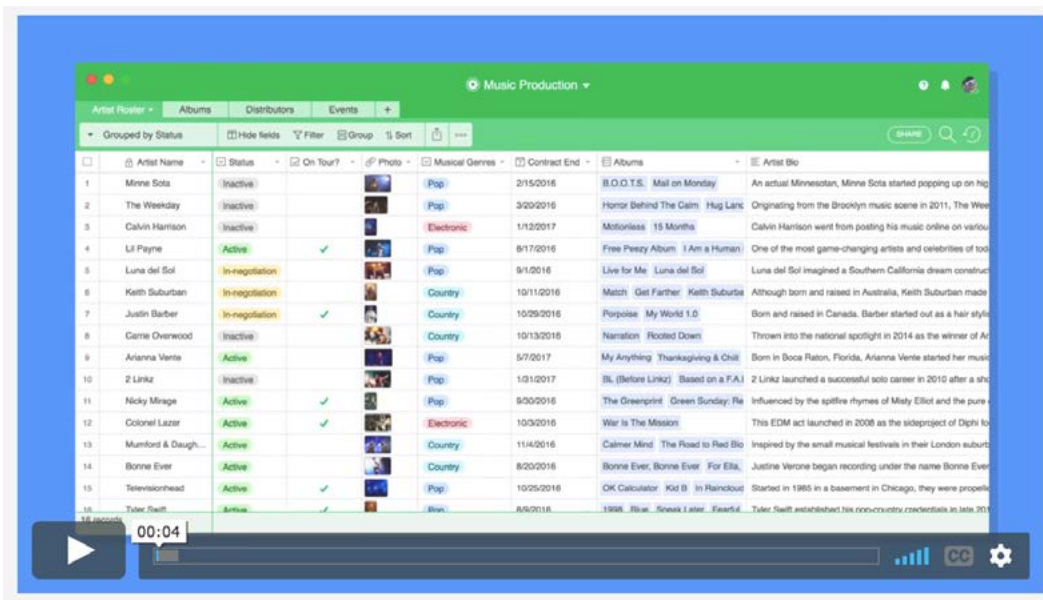
METHOD #1: Contextual Tour/Instructional Videos

Videos are typically expensive to produce and take a significant amount of time and effort to create. For some applications, including videos out of the gate might be necessary. But for others, tooltips, checklists, and chat-based support will suffice until the app becomes more complex.

With tour or demo videos, focus on illustrating the core purpose of the application – a high-level overview of how users accomplish their goals. With instructional videos, show the key functionality of the app at a slightly deeper, more interactive level.

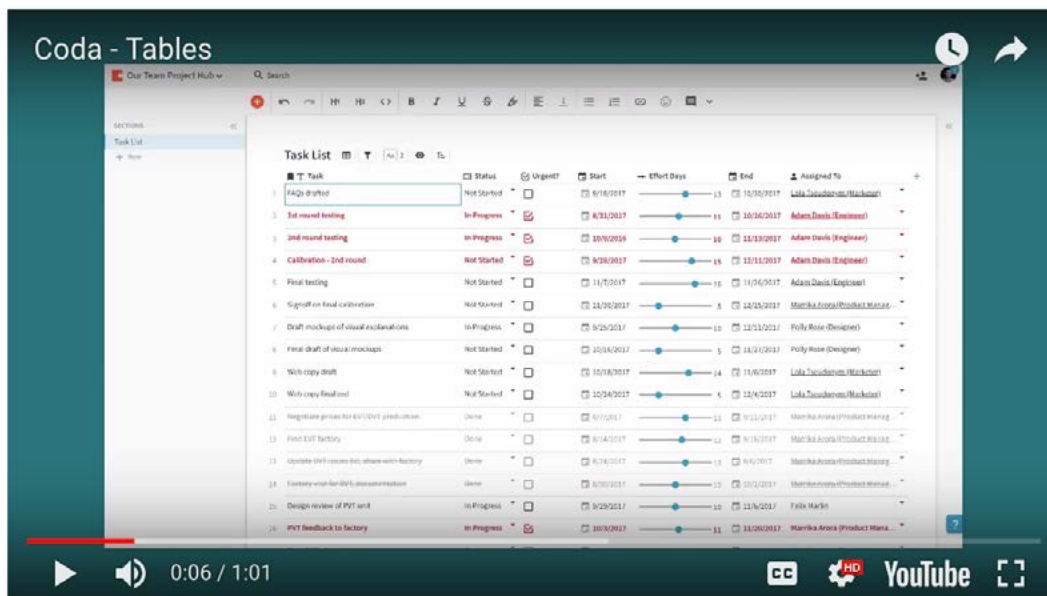
Example: Airtable

Airtable – a spreadsheet database hybrid – takes a familiar concept and puts a new (and powerful) spin on it. But users might not be familiar with spreadsheets that allow you to add pictures, tags, drop downs, and other interactive elements. Airtable uses a demo video that gives users a product overview.



Example: Coda

Coda – a cloud-based document editor – is also a new, sophisticated form of a word processor, with new functionality that at first glance might be hard to grasp. While users might be familiar with docs, spreadsheets, and data tables as separate tools, Coda combines them into one tool. In a one-minute video, users get both a product overview and a tutorial of how Coda's tables feature works.



METHOD #2: Email Tutorial Campaign

This approach can come much earlier, but an email tutorial campaign can be an effective strategy for long-term retention given that functionality is “dripped” to users via email gradually.

While there are marketing campaigns conducted via email as well, this method is focused on identifying a message that needs to be communicated to users and bundling in resources along with it. Users are introduced to articles, videos, knowledge, and tips about how to make the most of their interactions within your application over a period of weeks or months.

Example: Hypothetical Email Tutorial Campaign

Below is a sample of an email tutorial campaign that takes place over five weeks. Depending on a target user’s needs, the resources can change. Generally, you’d include videos, tips, and articles that will accomplish the purpose of generating interest and providing relevant support.



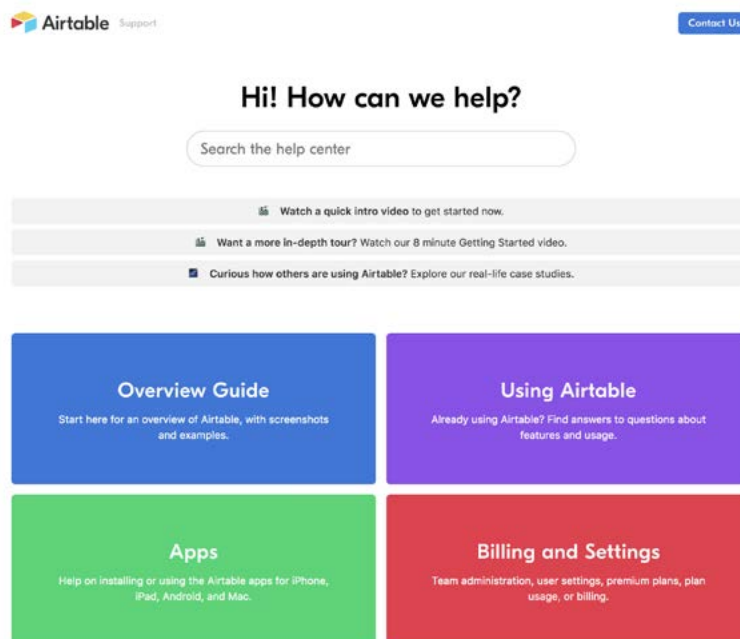
METHOD #3: Support Library

A support library – synonymous with a Help Center – is your repository for all of the information and resources a user would need to be fully equipped when using your application.

Effectively organized support libraries are incredibly important. For example, not every user will have the same questions or concerns. Giving users the ability to find relevant resources is essential. Typical resources found in a support library include articles, videos, a Q&A database, and common FAQs. Navigating to a support library or help center would likely give users access to some of the same resources they'd receive during an email tutorial campaign.

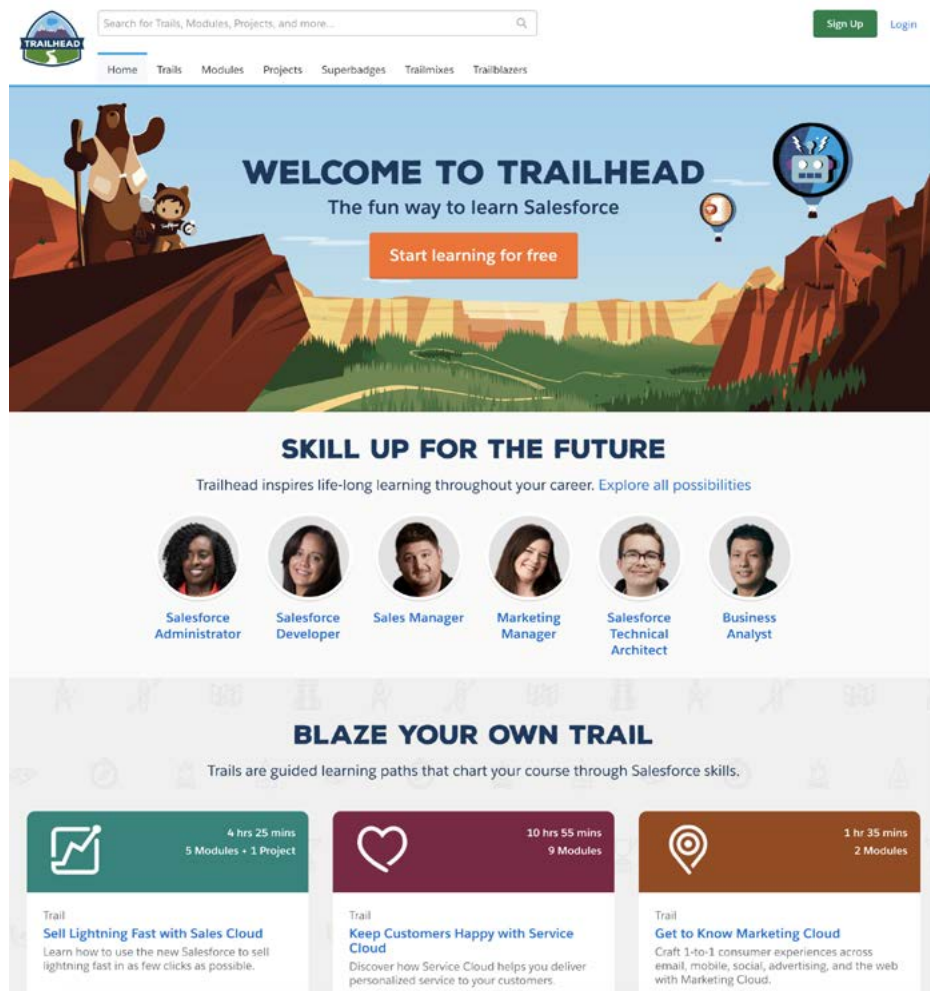
Example: Airtable

Airtable's Help Center provides users with in-depth knowledge about how to use Airtable, the different apps, billing questions, etc. It's truly comprehensive, but the organization of the interface is what sets Airtable apart. Users aren't required to wade through information that isn't relevant to them, and the experience of supporting users with a massive support library is streamlined and efficient.



Example: Salesforce

Salesforce – a customer relationship management (CRM) software – was created in 1999. As the application’s number of features has grown and its complexity has skyrocketed, the company needed a way to support users with a help center. With Trailhead, they gamified it.



Users can filter “Trails” based on their familiarity with Salesforce and their company role. After finding the relevant lesson, the user can find learning objectives, articles, and videos. By completing the lesson, they earn experience points, which gamifies the process, providing additional engagement.

WHAT APPROACH TO ONBOARDING IS RIGHT FOR YOUR USERS?

Enabling users to intuitively pick up your application and begin using it – without being frustrated and deleting it immediately – is a tall order. With so many possible approaches, the art and science of onboarding new users is complex.

Just as you wouldn't want to introduce every possible feature in the first version of your application, you'll want to think strategically about which onboarding elements to introduce too. Developing a strategy that takes into account your short-, medium-, and long-term goals will increase your chances of being successful.

The goal of onboarding is to distinguish your app, create a positive first impression, and enable user productivity. By being aware of the methods mentioned above and some great examples of applications that use them, you can begin making your own plan for how to integrate a high-end onboarding experience into your app intuitively and successfully.



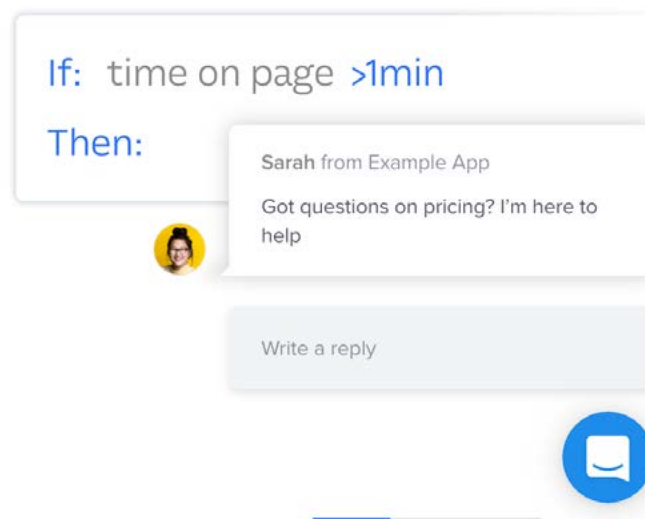
Recommended Third-Party Tools

Just as not every application needs a robust support library, instructional videos, or a gamification component, not every application needs to be integrated with third-party tools. But in some cases, they're helpful. Read below to learn about Intercom and Zendesk, two third-party tools we recommend considering.

Intercom

Intercom, which can be integrated into your application with a few lines of code, is effective for creating long-term onboarding and support campaigns. A developer can plug logic into the experience to allow a company to send targeted in-app messages to users while they're logged in. Often, these messages can include tips, videos, and links to resources.

While providing tooltips, empty states, tasks lists, and videos can be helpful, Intercom can help you design when users find those resources, guiding them through your application effectively.



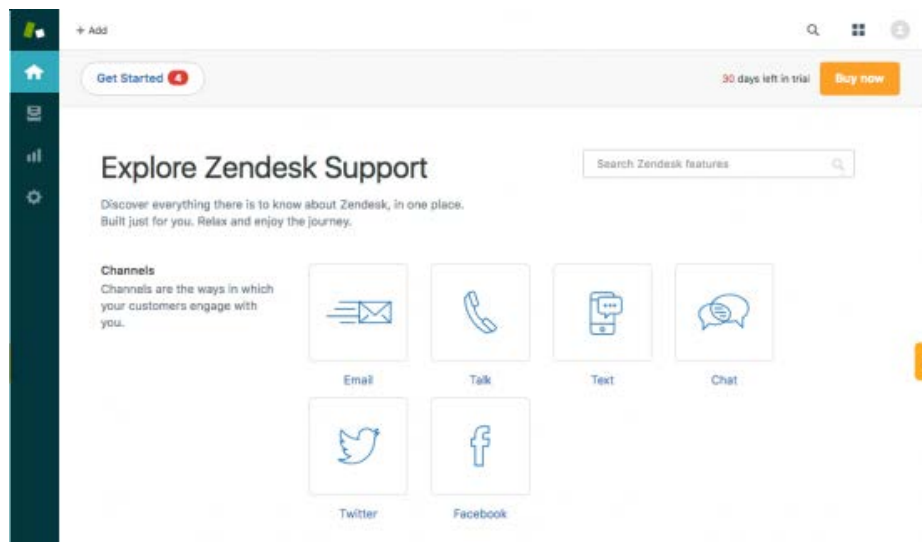
Zendesk

[Zendesk](#) is a customer service platform that allows companies to provide support in a variety of ways. As opposed to being a method of onboarding and support, Zendesk is a third-party integration that has a variety of useful features including:

Zendesk Support: A “simple system for tracking, prioritizing, and solving customer support tickets.” Support gives company agents a centralized hub with all of their relevant support resources.

Zendesk Guide: A feature that allows companies to “quickly build a customizable help center, online community, and customer portal so customers get better self-service.” It allows companies to use Answer Bots to “resolve high-frequency, low-touch tickets by sending customers relevant articles while they wait for an agent.”

Zendesk Chat: Similar to Intercom, you can use chat to “Reach your customers, instantly via web, mobile, and messaging.”



AUTHORS



Jeff Dance
CEO

Jeff is Founder and CEO of Fresh Consulting. Formerly a Strategy & Operations Consultant at Deloitte Consulting, Jeff brings years of experience in the creative design and digital technology space, building teams and overseeing hundreds of digital projects.



Ben Spencer
UX Researcher

Ben is a UX Researcher and Writer with a background in screenwriting and the ability to develop sturdy narratives unifying concepts, users, and the end product. He studied Film Studies and Religion at Whitman College and UX Design and Research at General Assembly.

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