

How to onboard users effectively

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Users aren't as interested in the product as they are in striving for the best result for their goals. Effective onboarding, easily and efficiently, guides users to their desired outcomes as quickly and as effectively as possible - so let us find out, how you can best onboard your users!

How it works

The onboarding phase creates constant associations with your brand and product and sets the mood for the entire upcoming customer journey.

Onboarding trial users is a lot more than simply creating a user-friendly environment that is easy to master. Successful onboarding involves different stages that help with specific goals:

1. Product learning curve
2. Product engagement and habituation
3. Product success enablement
4. Product value realization

In this article, you will learn what main tasks arise from these stages and how to master them.

Stage 1: Product learning curve

Make your users understand and use your product in the most efficient way to ensure that they realize its full potential.

How to do this?

- Enable your users to sign up and **move on to the actual interface quickly**
- Take **full control** over the initial steps your users take to make sure they **achieve some quick-wins**
- Make your users **familiar** with key elements and features within your application and ensure that their attention is **focused** on the feature they're currently learning
- Clarify the workflow's structure and how to **integrate** other solutions
- Prevent users from leaving your platform by showing them the most **efficient** way to get from A to B
- Let your users follow a specific **checklist** of tasks and guarantee that they know where they are in the onboarding process

Stage 2: Product engagement and habituation

Create habit-forming patterns, so that your users keep using the product

- Build the basis for **engagement** and **activation**
- Make your users **accomplish actual tasks** immediately so that they directly see results
- Motivate your users and reward them for their **progress** and completion of onboarding guides
- Block advanced features to ensure that your users **interact successfully** with basic functions first.
- Create a **smooth** experience to prevent churn caused by delays and frustration
- Set a **positive mood** for future relationships and make them feel **excited to continue working with your application**

Stage 3: Product success enablement

Make product success easy to achieve and repeatable by knowing your customer's objectives and enabling them to reach them effortlessly

- Make your users **understand** the extent a software can help them reach their goals
- **Eliminate confusion and insecurity**
- **Segment** your users, address them **personally**, and adapt the onboarding as well as the user experience according to their **needs**
- **Follow** and **monitor** your users' behavior and use the collected data to provide adequate information as well as support when insecurities arise
- **Interact** in real-time with users that get stuck and guide them to the next step
- Continuously train users and surprise them with new functionalities based on **their feedback**

Stage 4: Product value realization

Make clear what the actual value of your solution is by showing them the results they can achieve with your product

- Point out what the product is designed for, what its **benefits** are, and what makes your solution **unique**
- Show the **personality** of your brand, be authentic and real
- Ensure that your users find a way to **reach their goals** as soon as possible
- **Prove** that you can actually **meet your customer's expectations** and **over-deliver**
- Show the user the **value proposition** of your solution
- **Sell your solution** as if you were pitching it directly to the user

This, and actually much more, needs to happen fast. Very fast!

People's **attention span** is limited and you need to continuously offer **variety** as well as **novelty elements** and draw the attention of trial users to their roadmap towards their goal.

You need to

- start with small steps presenting major and basic features
 - quickly allow users to reach **full proficiency** within your product.
 - **eliminate any frustration points**
 - allow users to feel good about their choice.
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