How to onboard users effectively

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.