Onboarding checklist

Transform your user onboarding to be a growth engine. Ensure your delivery tactics, messaging and touchpoints are optimized to create seamless first experiences that keep your customers coming back for more.

This checklist is designed to be a guide to help you think about the different stages of your user journey, from marketing to the first experience.

| **1. Pre-signup** |
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| * Does messaging demonstrate considerable benefits to users? * Are these benefits relatable? Can users understand how your product would improve their current situation * Tailored objection handling * Validation - customer reviews, real-life examples, testimonials & feedback * Establish if there are any potential friction points. If so, remove them! |
| * **2. At the point of sign-up** |
| * Only necessary fields included on the signup form - make it an easy experience * Establish if there are any potential friction points in the sign-up flow. If so, remove them! * Include a progress tracker to the signup flow so users are aware of the length of the process * Customer service is key - ensure you have live chat or similar for real-time help during signup |
| * **3. First product interaction/experience** |
| * New users receive a welcome message on the first login * An ‘easy win’ can be achieved in a few steps during the first product interaction * Users have visibility on how they will gain value from the product from the first interaction * Product tours are meaningful and not just a ‘show and tell’ * Gamify the first experience with a checklist or onboarding tools * Onboarding emails are relevant and timely - don’t overdo it * Onboarding emails help users get value from the product * Customer service is key - ensure you have live chat or similar for real-time help during onboarding |