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

- 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