

# Intercom on Onboarding

Second Edition





# Intercom on Onboarding

Intercom builds a suite of messaging-first products that all modern internet businesses can use to accelerate growth across the customer lifecycle, from acquisition to engagement and support.

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Editor: Davin O'Dwyer

Copy Editor: Zara Burke

Book Design: Tim Gilligan

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# Foreword

Trying out a new software product can feel awesome, like taking on a new superpower. Suddenly, you have a capability you didn't have before, like being able to have a face-to-face conversation with someone on the other side of the planet, or knowing exactly which song is playing in the restaurant you're eating in.

The real magic comes when we seamlessly acquire these superpowers. It sets the product/customer relationship up for long-lasting success right from the beginning. When this occurs, it's great not only for the customer but for the business too. Converting signups into long-lasting, churn-resistant users is a tide that lifts all departmental ships: marketing, product, customer support and beyond.

Unfortunately, most transitions from struggling-to-superpowered are anything but seamless. Signup, activation, first use and re-engagement workflows are often tacked on only at the last minute. Rarely are they given anything close to the attention that the "core" features of a product receive, which is ironic because onboarding is the only part of a product that every single user will experience.

In fact, onboarding can even pose a bit of a paradox in that way: the worse onboarding performs, the more often it will be the **ONLY** part of a product that a given user sees. You can create the most powerful features in the world, but they might as well not exist if users never have a chance to encounter them.

When a product's onboarding is underserved, the loss of users can be staggering. Every signup has the potential to be a valuable user of your product. And every signup has come to you thanks to the elbow grease of your marketing and product teams, who created a value proposition appealing enough to investigate.

Is that time investment – for both your company and its new signups – being rewarded with a robust, bulletproof activation process? Or is it being squandered with an experience that neglects the needs of first-time users, letting the majority of them slip through your fingers like sand?

Intercom has given this space a lot of thought over the years, first and foremost in designing and building products to help engage, onboard and retain customers. They've also consistently delivered phenomenal recommendations and insights via their [blog](#), [podcast](#), [guides](#) and, now, with the updated edition of this book, which builds upon the first edition with a number of new chapters exploring the latest thinking on onboarding.

This extra material covers a lot of new terrain: from a simple framework to understand the ideal onboarding flow to an in-depth exploration of how to write the content that helps your users achieve their goals; from advice on making a great first impression to ensuring that as many users as possible stick around, and so much more. In short, the writing that follows outlines time-tested thinking that will help your company thrive by helping its users do the same.

I truly hope you absorb and apply the advice this book provides. The world, and your business, could always use more superpowered people.

*Samuel Hulick, UserOnboard*

Samuel Hulick is *the authority* on user onboarding. Whether it's through his detailed and witty onboarding teardowns of some of the world's biggest products at [useronboard.com](https://useronboard.com), or his book [The Elements of User Onboarding](#), he's been central in bringing user onboarding front and center for modern software products.



# Introduction

When we started Intercom, our mission was to make business personal. So we took it upon ourselves to email every new customer to ask how easy setup was and to see if there was anything confusing them.

It was a manual process, but repeatedly talking to people who are trying to set up your product is a surefire way to help you learn that you need to fix your onboarding.

Even though onboarding wasn't as well studied as it is today, one thing was apparent: onboarding was and is the one truly universal problem every piece of software has. It's the only thing literally all your customers are going to do, and you're guaranteed thousands of your users will run into some kind of difficulty with it.

It doesn't matter if you've tried every marketing technique under the sun, if you're not onboarding users successfully it counts for nothing. Why would you invest so much in trying to attract users but not go the extra step and try to keep them?

One of the obvious traps startups fall into is seeing onboarding as just the first three screens after signup. They fall for the snake oil of optimization and think a blue button instead of a red one will magically deliver engaged users. In reality, onboarding is the online equivalent of white glove service, of holding your customer's hand as you guide them from feature to feature, flow to flow, listening to their intentions and ensuring they find the right parts of your product to get started from. And it goes far beyond their first visit.

Onboarding is the phase a customer goes through in between making the decision they want to use a product and being a fully satisfied customer extracting lots of value from the product. In short, it's about ensuring your customers are successful.

This new edition of *Intercom on Onboarding* includes our latest thinking on the topic, diving into the lessons we've had to keep learning as we've scaled. Since we released our last book we've launched an entire product in the space, [Product Tours](#), so as you'd guess, our thinking has matured. We don't talk about hacks or gimmicks, instead, we cover everything we've learned that works – from redesigning your onboarding for new contexts, to guiding customers through their first visit, to turning them into long-term loyal customers.

While a lot of these lessons come from direct experience, they're bound by a universal truth any startup can take away. Good onboarding comes from focusing less on your own business and more on your customers. It's not a metric, it's an outcome – successful users.

Once you get that right, everything follows from there.

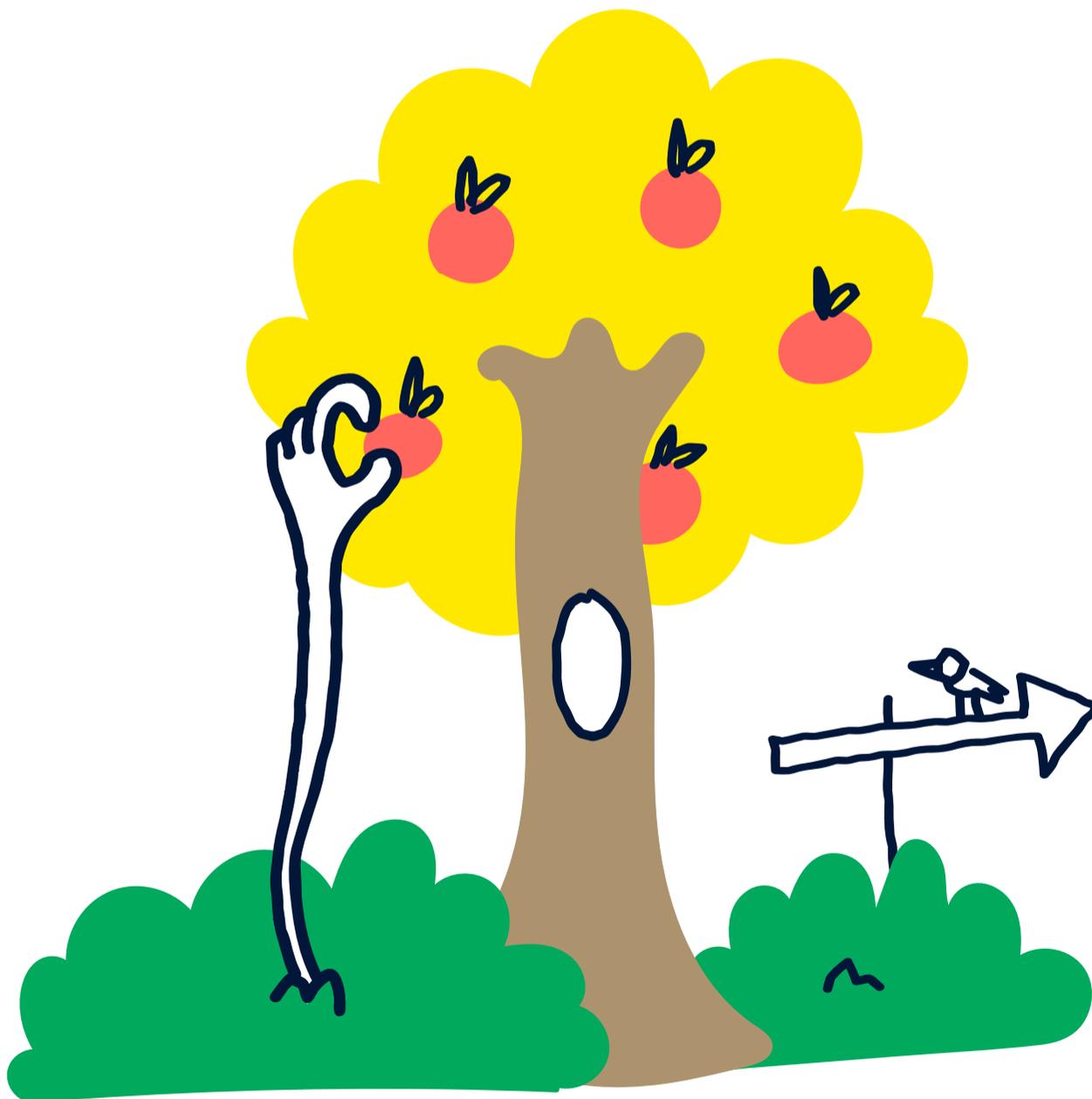
*Des Traynor, Co-Founder, Intercom*



**CHAPTER 01**

# The low-hanging fruit of user onboarding

*Des Traynor*



Onboarding has traditionally been of two kinds – either “Let’s point out our interface” or “Let’s decide where we want our user to end up and push them that way.”

Both have an important role to play in onboarding, but if not implemented in combination with other approaches, they are likely to miss the mark – on their own, they don’t understand the difference between correlation and causation. Just because a user has reached 100% on an onboarding progress bar, or they’ve been told how to add a teammate, doesn’t mean they’ll make adequate progress and become a long-term user.

The best onboarding is the kind that pays less attention to getting users to complete steps the business cares about and more about getting them to experience “successful moments.”

These successful moments usually have nothing to do with optimizing button colors or calls to action and everything to do with gaining a better understanding of who your user is, what it is they are trying to achieve and where they currently are in your workflow.

Finding these successful moments is more difficult than adding a progress bar. It involves actually talking to customers while they’re signing up and after they’ve signed up, learning as much as you can. But nobody said acquiring and retaining customers was easy.

## **Moving past the signup stage**

High growth companies and startups are knee deep in customer acquisition metrics. Click-through rates, cost per click, cost per lead, conversion rate, cost per acquisition and more.

Some wade through data looking for easy tweaks, hoping that changing a button from red to green or adding words like “Free” and “Now” to landing page headlines will add another 0.01% to their funnel. At best, this Fisher-

Price psychology gets them a few quick wins. At worst, they spin their wheels for weeks pushing complexity around from one screen to another, all in the hope of growing signups.

“What happens to the users who sign up?” you ask. Well that’s the funny thing: most of them churn, but that gets less attention in this game of Whack-a-Metric. It’s worth remembering that recovering a lost signup is worth just as much as capturing a new one. Of the hundreds of Intercom customers I’ve spoken with, they all have a variation of this problem: people sign up, click around and disappear. That’s where user onboarding comes in – turning new signups into loyal and engaged customers.

With each successive generation of onboarding, the focus has shifted slightly from what the business wants to what the customer needs. Early onboarding was outside of the product, where help manuals, and later websites, were offered to users – externally and out of context – in the hopes they would use them instead of contacting support. Since then, onboarding has slowly moved inside the product.

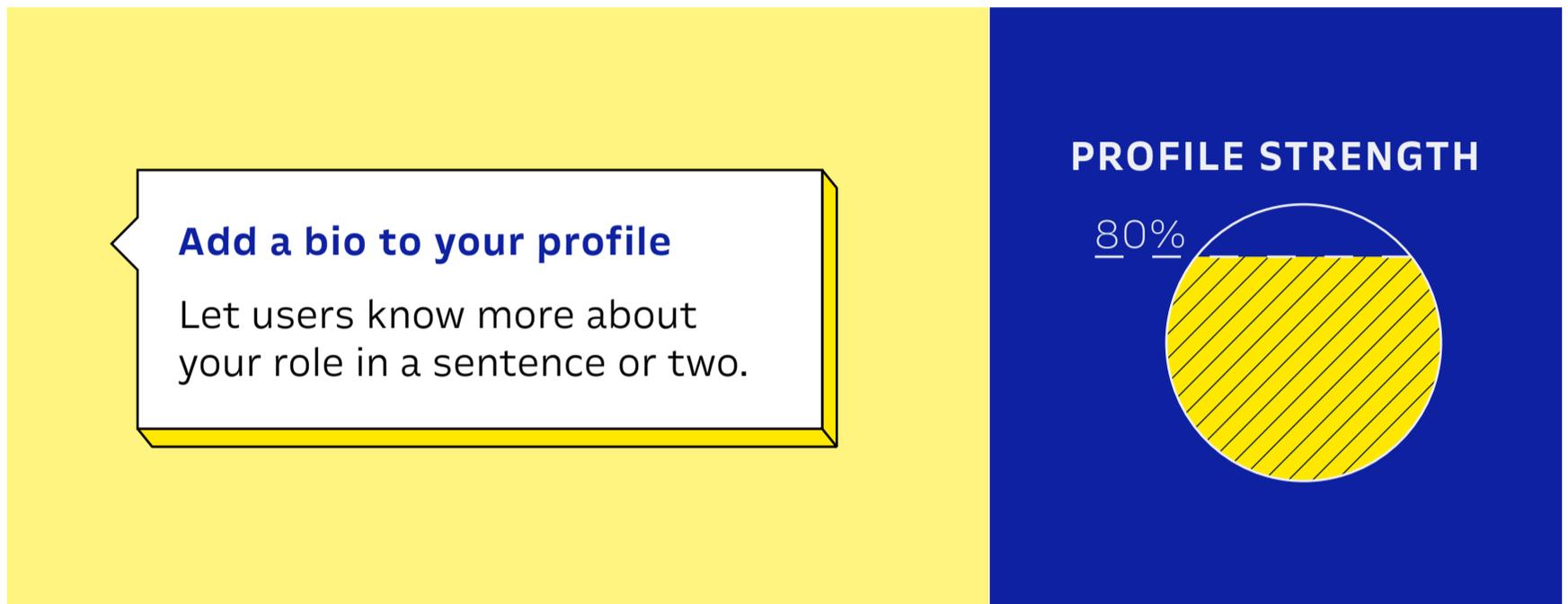
## Interface is king: onboarding 1.0



The first onboarding attempts focused on the user interface alone. Instead of focusing on the users’ definition of success, businesses tried to reverse engineer user desires from each piece of interface. For most interfaces,

this amounts to tooltips pointing out buttons and menus that don't help customers achieve their actual goals – but tooltips can't be truly effective when they focus on the product rather than the user.

## Progress bars: onboarding 2.0



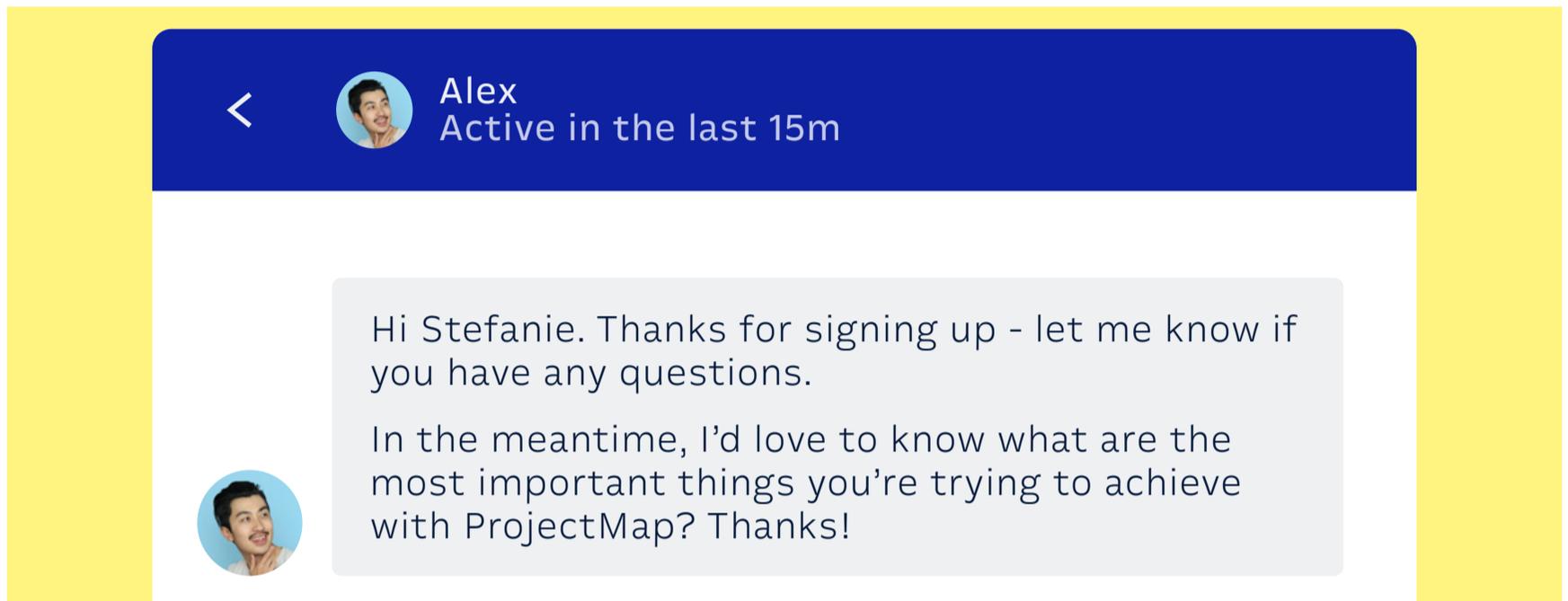
The next era of onboarding was made famous by LinkedIn. Gamified progress bars shepherd users through a series of hoops, not too dissimilar to how trainers get their poodles to win the top prize at a dog show. This approach consists of identifying a set of tasks you want every new user to do, arbitrarily giving them a percentage score for each task and then bugging the hell out of users until they hit 100%. Gamification: the multi-billion dollar industry that never happened.

Again, progress bars are quite effective but are still internally focused. They ensure the user does what the business wants, but not necessarily that users achieve what they want.

For simple, well-defined products, there's little difference between a user's immediate desire and the metrics the business uses to record progress. But for anything more complex (e.g. B2B SaaS products), this can result in force-feeding configuration options to a user who simply wanted to manage some tasks or requiring a user to invite their team before they've finished assessing the product. For example, many products ask users to invite

additional friends who aren't on the service before they show a user's onboarding as complete. Does this benefit the business or their customers?

## Understand the customer's definition of success: onboarding 3.0



Rather than relying solely on emergent metrics and then forcing users to hit some business targets, modern onboarding focuses on the user and what they want to achieve.

This begins with continually asking newly signed up customers what they are hoping to achieve with your product. You will learn:

- **Their functional goals** (e.g. organize my team's tasks).
- **Their personal goals** (e.g. let me feel in control).
- **Their social goals** (e.g. impress my boss).

You also need to ensure each new signup believes they are on a path to achieving their goals. This is what successful onboarding does. Slack sets the bar high in this regard – their Slackbot guides new users through setting up their account by asking them a series of questions. Not only does the user set up their account, but they are learning to use Slack at the same time.

# Onboarding your customers for success

The purpose of a trial is to convince a potential user your product will deliver what they need at a price they can afford. It's about getting them to those "successful moments." It's important to remember this is their success, not yours, and has nothing to do with filling in database fields to complete their profile. Onboarding is the key here. So here are five steps to improve your onboarding:

## 1. Understand the different jobs your product is hired for

You might regard yourself as being in the "project management" category, but people who sign up might actually be trying to "improve productivity" or "get better at remote working." Yes, your product solves these problems through the lens of project management, but it is important to know what use cases, examples and copy will motivate your customers versus what will fall on deaf ears.

## 2. Understand what success looks like for each of these jobs

People aren't using your analytics tool for the sake of it; they're using it to get promoted, to prove their worth or to rally a team behind a common problem. A very simple step here is to ask new signups what they're trying to achieve with your product. Once you know that, you'll be amazed at how many onboarding changes you'll want to make instantly.

## 3. Design paths guiding them through the features that help them achieve this

Once you know the end goal(s) of your target users, you can design a flow to guide them to it. If there are distinct end goals that differ (e.g. "I want to share my design work" vs. "I want to get more design gigs"), it's best to let new signups declare their desire up front so you'll never be tone-deaf.

#### **4. Communicate with users to help them get there**

Sadly, most product communications during trials are badly targeted, usually using “time since signup” as the key. In reality, just because it’s been seven days, it doesn’t mean I’ve done anything useful. Similarly, I could have signed up yesterday, spent all day in your product and be fully up to speed. Activity matters, usage matters. Understand where I am, where I’m going, and send me messages that help me get there.

#### **5. Have an early warning system for new users**

Most products wait until a customer cancels, or fails to convert, and then the apologetic pleading messages begin. This is when you’ll see “How can we get you back?” emails to a customer who has already checked out. That’s like waiting until you see divorce papers before checking how your spouse is doing. Instead, know what failure looks like and start the conversation before it’s too late.

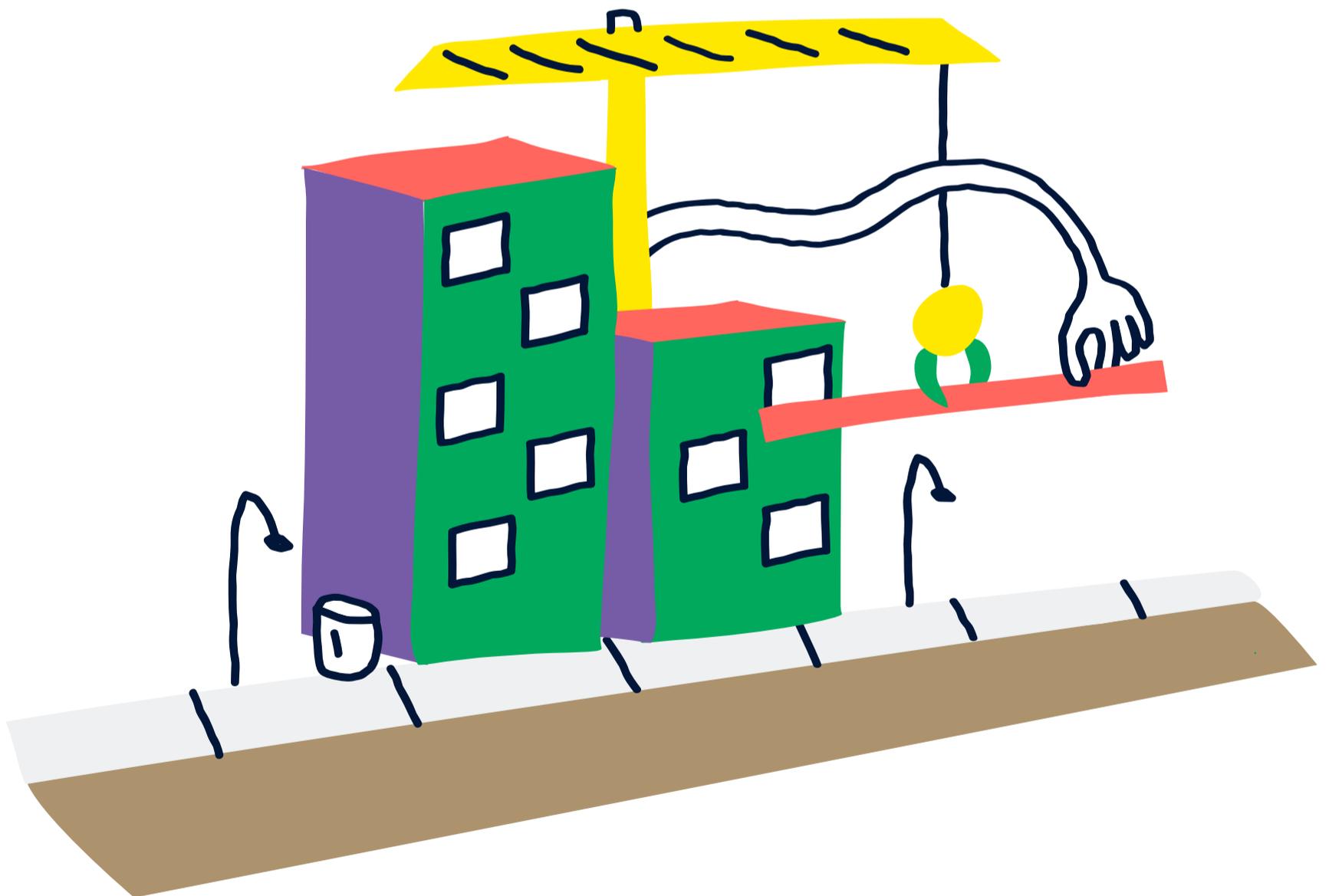
Collectively these steps won’t solve everything, and it’s a fair criticism of the discipline of onboarding that a lot of this advice maps back to Good Product Design™. But as we discussed at the outset, you can go back to tweaking button colors, or you can try something new: help your customers be successful. Do that and you’ll find there’s low-hanging fruit, and lots of it.





# C.A.R.E. – A simple customer onboarding framework

*Ruairí Galavan*



**A** well-considered and well-maintained onboarding funnel will grow your business. A leaky one could kill it.

In software, when you think of “onboarding,” you might just think of product tours where customers are shown the various components on the UI via pop-ups, or you might think of empty states, where the UI is in a unique one-time only state, giving the customer guidance on how to get started. Another approach is progressive disclosure, where there’s a conscious decision to avoid overloading the user with too much complicated information all at once.

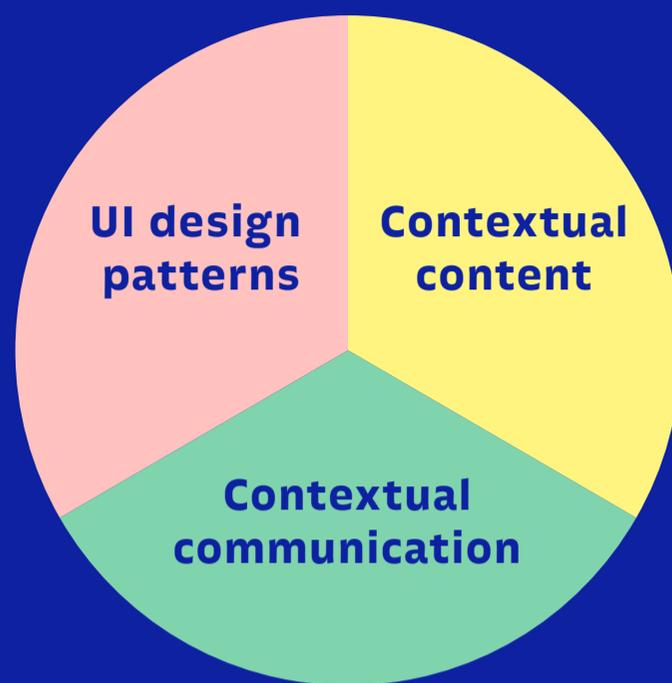
While all of these patterns are usually very helpful to new users, this is where many onboarding experiences begin and end.

All too often, onboarding is a finite project that’s owned by a single team (probably Product or Growth) and has a due date. It’s shipped, checked off the roadmap, and everyone moves on to the next project. This is absolutely the wrong way to treat your onboarding.

Onboarding must be a continual process for your business. That’s because onboarding is not a project or a feature – it needs to be an ongoing concern, a mission, a mindset, a strategy that needs to adapt over time as your product and business evolve. It must be a continual process for your business and your customers.

As your business grows and gets different types of customers, your onboarding will need to adapt. You’ll never be “finished” working on onboarding. And even your most loyal and active customers need to be continually onboarded to new areas of your product.

Furthermore, thinking about onboarding only in terms of UI design patterns is limiting. In fact, successful onboarding has three core components:



## 1. UI design patterns

Design plays a crucial role in onboarding. There are many popular patterns out there that you're probably familiar with and might employ for your product's onboarding – these could include gamification, progressive disclosure, empty states, product tours, audio guidance or first use one-time tutorials. The key is to find which one makes the most sense to your product and your customers and then make sure it's a part of your onboarding experience. Don't just point out your favorite features either. Instead, use UI design patterns to guide users through a series of meaningful steps that helps them achieve their definition of success, as discussed in the previous chapter.

## 2. Contextual educational content

Approaches consisting of demos, webinars, docs, videos, gifs and even short instructional UI copy all contribute to a great onboarding experience. Having some of this material available in a help center for reference is great, and we definitely recommend it, but it's not realistic to expect your new signups to go digging through your help center in order to educate themselves on your product.

The quality of where and how a customer encounters content is just as important as the content itself. Your awesome help video isn't effective sitting over on your help center when your customer is in your product struggling with the basics of setting up their account. That's not where your customers need it. They need it in context, using your product, at a specific time.

### 3. Contextual communication

We've written a lot over the years on the benefits of well-placed and well-timed communication. Contextual in-app messages are extremely effective for encouraging onboarding actions. For example, a strong in-app welcome message can play a significant role in your customer's onboarding UX. It's one of the key onboarding messages you should send.

But while messaging is important to get right, it should only ever enhance or complement the other competencies. Over-reliance on it leads to over-messaged customers.

## **Introducing C.A.R.E. – a simple framework for customer onboarding**

Having these three competencies in place is a great start but it won't enable you to form an onboarding strategy. To do this, you'll need to make sure that the three core competencies feed into a wider onboarding strategy that focuses on your users' entire lifecycle, not just the initial setup. A great place to start would be to employ what we call the C.A.R.E. model of onboarding:

## **C** – Convert trialists to paying customers

Once a customer signs up or starts a trial with your product, it's your mission to show them the value of your product so that they'll pay for it.

## **A** – Activate newly paying customers

When customers start paying you for your product, they'll often get no value from it. For your product to survive, you need to activate them, by getting them to take the actions that will enable them to see value in what you're selling. For Intercom customers, that's things like setting their first message live.

## **R** – Retain paying customers

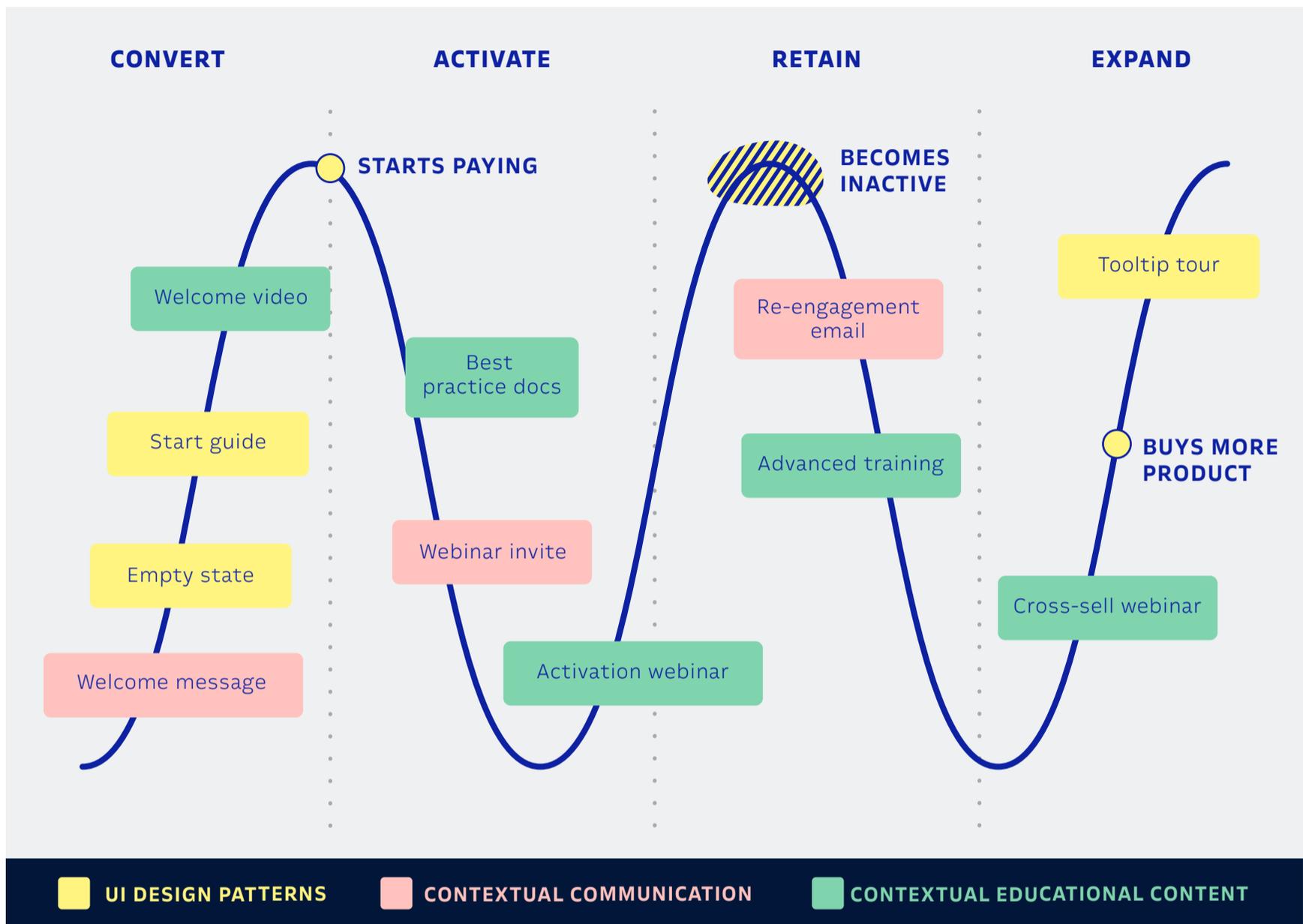
Once a customer becomes active, there's no guarantee they'll stick around. You need to work hard to keep them on board.

When designing your retention strategies, remember to be primarily proactive and secondarily reactive – although both are necessary. In other words, do not wait until someone has stopped using your product before doing something about it. Examples of proactive activities include continually shipping, offering training, creating best practice content or inviting customers to community events. Reactive retention strategies include giving world class customer support, sending re-engagement emails or offering discounts to log back in.

## **E** – Expand their usage

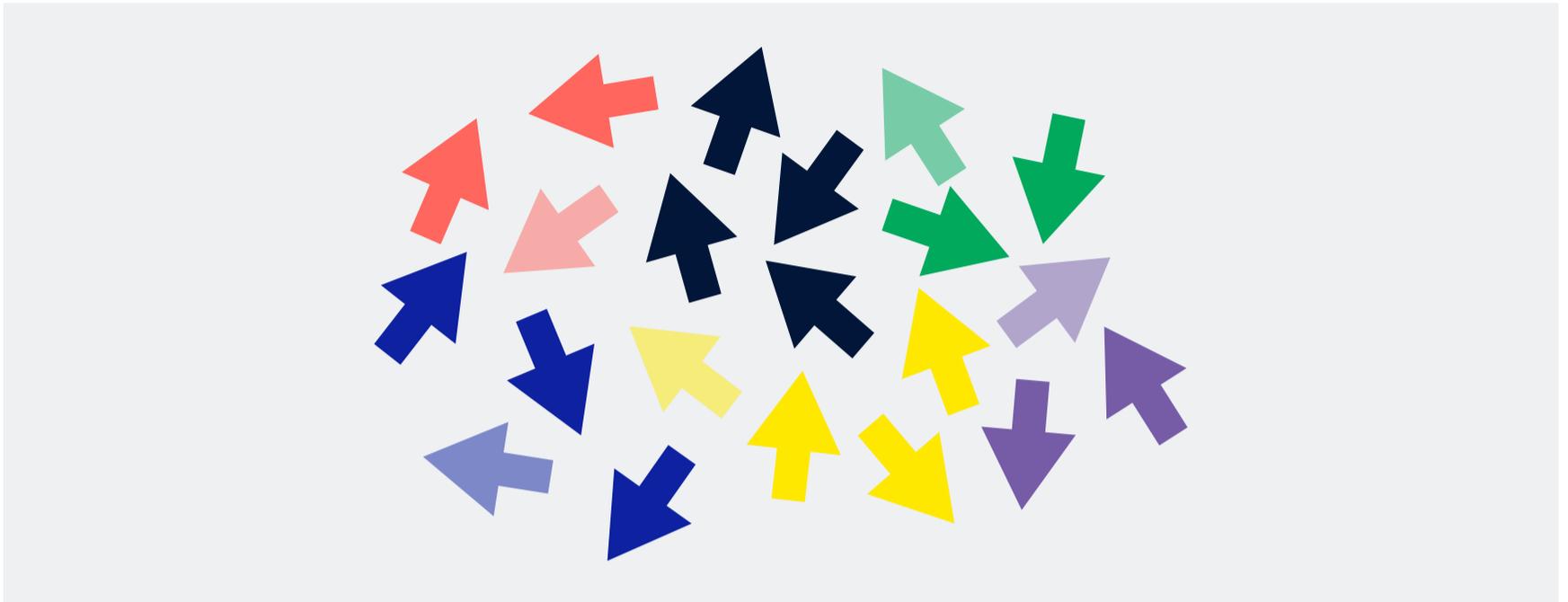
Active paying customers are great candidates to hear about your other products or services. There's likely significant latent demand among your customers for the other things you sell, whether that's upselling high-end customers to your pro plan or cross-selling them complementary products.

Using the C.A.R.E. model and employing the three core components of onboarding, here's what a sample end-to-end onboarding UX might look like:



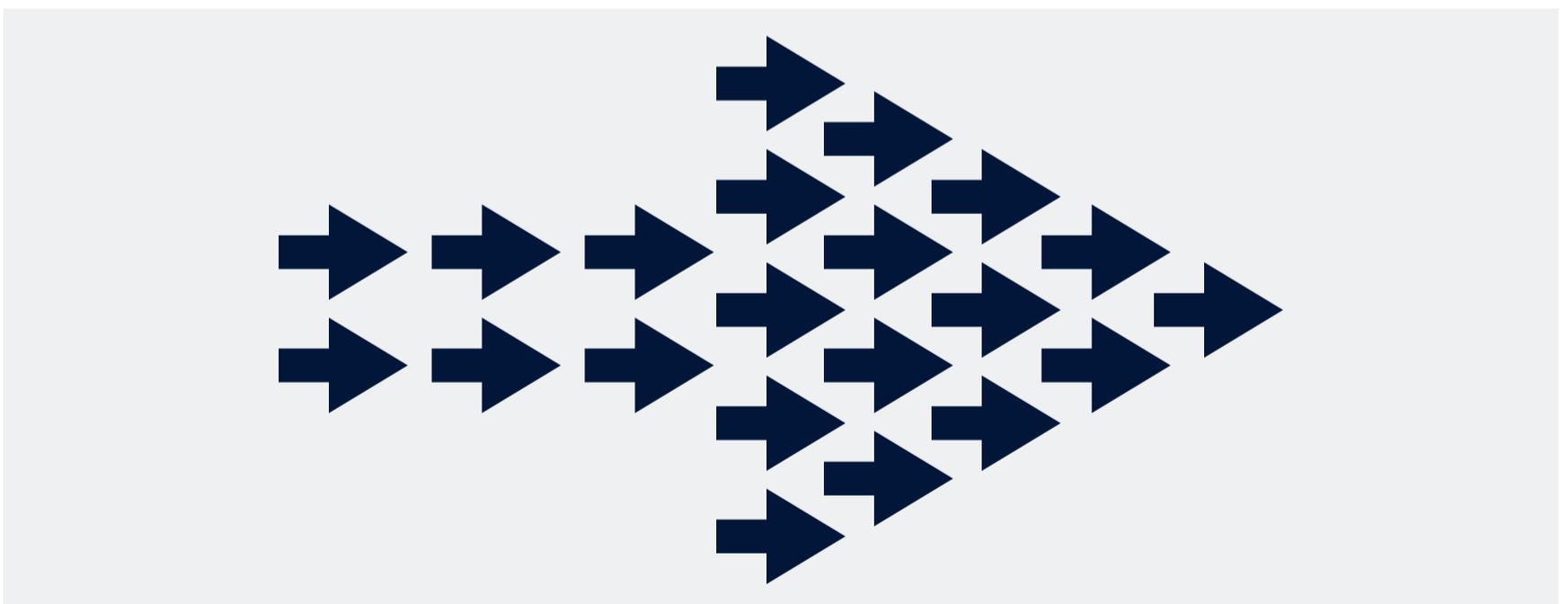
## Aligning around the end-to-end experience

In many organizations, the three areas of competency live across different teams. Sales might own communication, marketing might own content and product will own the UI. This can result in sporadic messages that don't consider the content, content that doesn't reflect the latest UI and a UI that doesn't know when and where those messages send. You're all working on onboarding but not together. And it can feel a bit like this:



The last thing your customers care about is your organizational divisions. And your onboarding funnel will spring leaks if these divisions are exposed in your onboarding UX.

All these elements need to form a unified system; a single experience thought about, owned by and worked on by the same group of people. Software companies should be forming onboarding teams or at the very least, making sure members of different teams are collaborating closely in onboarding working groups. You want your onboarding strategy to feel like this:



In short, the less businesses think about onboarding as disparate efforts (whether that's a welcome email or a piece of UI) and more as a holistic system, the more successful they'll be. Only then can you have a fluid, frictionless, unified onboarding user experience.





**CHAPTER 03**

# Killer user onboarding starts with a story

*Samuel Hulick*



Signing up for a new product is an expression of hope. When someone invests their time in trying out something new, they're opening themselves up to the possibility that the way they've been doing things hasn't been so hot; that the way the new product affords will help them do it better.

Whether that hope becomes a reality or not ultimately comes down to successful onboarding. The product can either deliver someone from a not-so-great situation into a much better one, or they can revert back to the way they've previously been doing things.

Failing to realize that hope is a bummer for both parties – the business has lost a potential user (and with each churned signup, their overall cost-per-acquisition has gone up), and the potential user has wasted time they could have spent doing something useful. So how can you best stack the deck in favor of a good outcome for all parties?

The answer isn't easy, but it's also relatively simple. Get a crystal-clear picture of what the “good” situation you can deliver people to is, but at the same time genuinely understand the psychological motivations driving someone away from their existing “not-so-good” situation.

Once you're able to fully take on your users' perspectives on why they're feeling restless before signing up and what they're hoping to find on the other side, you can much, much more reliably design a welcoming workflow that will usher them into the rad new life they're looking for.

## **Onboarding's higher calling**

If you want more people to adopt your product, you have to make sure you know what progress looks like in your user's life, not just on their screen.

Having a stellar user adoption rate is a beautiful thing. Converting users at a higher rate drives down the cost of user acquisition, which in turn stretches your marketing resources even further. It also means people stick around longer, driving up average lifetime value, and letting you invest your product resources more strategically.

The secret to getting there? First, identify the must-have experience that keeps people coming back, and make sure new users experience it.

Ensuring new users have that experience is a responsibility put on onboarding, even though onboarding itself is rarely designed to deliver it. Rather than relentlessly focusing on progressing the user to success, onboarding workflows often seem content to simply introduce the interface and call it a day.

It's a real shame, because for onboarding to answer its higher calling, it has to go beyond moving people through a feature checklist. The story you build your onboarding experience on shouldn't be about your user interface, it should be about your user. And in order to build on solid ground, that story – the one beginning and ending with the user – needs to be thoroughly understood.

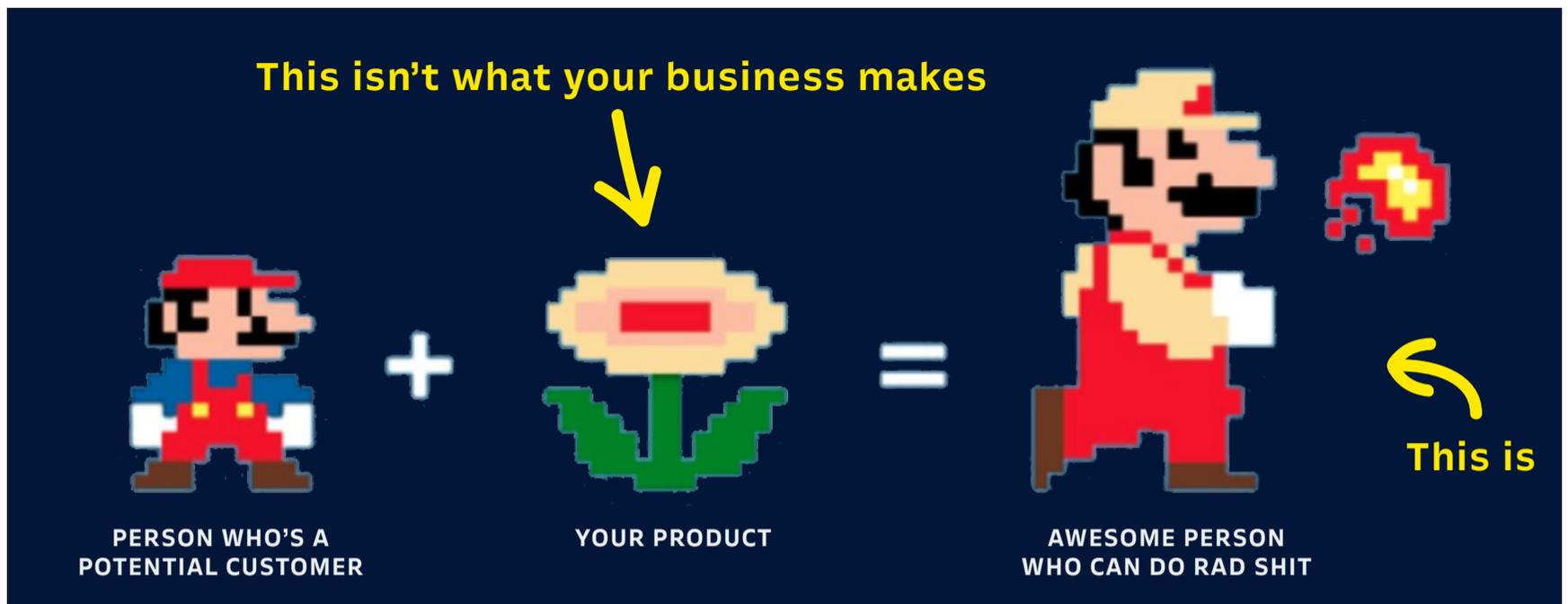
## **Setting the stage for successful onboarding**

When you boil it down, onboarding is really about changing people's behavior. Your signups are frustrated with the way they're currently doing something and are hoping your way of doing things is better (or else they wouldn't be signing up). Onboarding strives to make that behavioral switcheroo a successful one for as many people as possible.

Onboarding, when working well, is less an instruction manual for weight benches and more like a personal trainer; they don't stop once they've shown you how the equipment is used, they make sure you attain your fitness goals. The same goes for user onboarding; in order for it to be successful, it must ultimately engender success in others.

So, long before you begin to weigh your interface options (“Should I go with an intro video or a series of tooltips?”), let's make sure you're clear on what your users are trying to get away from and where they want you to take them.

# Why are people “hiring” your product?



Let's begin where your users begin: the situation they don't want to be in anymore. To continue the “personal trainer” metaphor, this is the last time the person unhappily stares in the mirror, before finally deciding to do something about it. It's the specific, burning motivation driving them to adopt a new way of doing things.

[Clay Christensen](#), innovation expert and bestselling author of *The Innovator's Dilemma*, calls this motivating situation the Jobs-to-be-Done. The concept is that products are acquired in the same way a company opens up a new position in their organization: they recognize there's a need to grow or adapt, and they need to make a “hire” to fix it.

For example, someone may encounter an “I need to unwind” situation after a long day at work, and “hire” Netflix to help relieve some stress. Or a startup may find themselves in a “We need to get better at engaging visitors to our website” situation with their product and “hire” Intercom to get the lines of communication flowing freely.

Frustrating situations open up new “employment” opportunities, and intimately familiarizing yourself with them makes sure your user onboarding nails the “interview.” However, you can't discover them through demographic research or behavioral data. To fully understand what drives your users, you have to go straight to the source with interviews.

## Who should be interviewed, and when?

Whenever possible, interview people who have just crossed the finish line to becoming highly engaged users. Chris Spiek and Bob Moesta, Jobs-to-be-Done practitioners and co-founders of the [Re-Wired Group](#), refer to this as the “switching moment.” If you charge for your product, it’s the moment people start paying. If you don’t, you’ll need to come up with your own engagement indicator and use that as the point of introduction.

Why is the timing important? If you’re approaching users before they’ve made the switch, you run the risk of interviewing people who won’t actually stick with your product. Approaching them too long afterward, though, means they’re less likely to clearly remember what drove them to change things up. People who have recently switched are proven customers, but can still recall the emotional memory of the whole process, which is exactly what you’re looking for.

## Where does their story actually begin?

When conducting your interviews, try to keep participants focused on their actual actions and feelings when making the switch. People are notoriously unreliable at predicting their future behavior and attitudes, so framing everything around what really happened (not what usually happens, or *could* have happened) during their onboarding keeps your emerging story tethered to reality.

Asking for specifics also helps transport people back into the actual moment, which brings up valuable additional details. Rather than asking them if they had an easy time with setup or not, get to specifics by asking which part was the trickiest, and deeply explore that moment. For example, while someone might not have a lot to add to “Are you a safe driver?”, asking them to specifically recall the last time they were pulled over by the police would immediately thrust them into a story rich with emotional details.

Be sure to track every story’s breadcrumb trail as far back as you can get your interviewee to remember. The narratives that lead up to decisions can

be surprisingly long – much longer than the surface shows. A journey to a car dealership may at first seem to begin with seeing a newspaper ad. But after a little bit of digging it could turn out to have really started with a funny noise in the engine two months before. Onboarding always begins with the motivation to change, which always takes place before the user lands on your site.

If your user onboarding story was a movie, your product itself wouldn't appear until long after the action was already underway (and remember, the user is the star of this show, not you). Retracing their steps – especially the ones before your product comes into the picture – provides you with the context you need to correctly kick the transition off.

## **What has to happen for adoption to succeed?**

Now the starting place is well-explored, have your interviewee recount their steps forward all the way to the moment they became fully up and running with your product. It's unlikely to have been a direct path, so encourage them to meander or head off on seemingly unrelated tangents. These often provide the richest insights of the entire conversation.

For example, if your product's setup process needs the user to import a bunch of data for everything to be fully up and running, urge them to take the scenic route in describing every little detail of how they accomplished it. Did the numbers come from a spreadsheet? If so, was it in Excel or Google Docs? How many sheets did it have? Did they import the data by uploading the file or by pasting it in by hand? How did the numbers even get into the spreadsheet to begin with and how long did it take to be populated?

Cataloging the external tedium involved in getting set up with your product doesn't just provide you with plenty of low-hanging fruit for making the transition much easier for your new users. It also gives you a clearer picture of all the pressures they're dealing with during the time they actually spend inside your product.

In fact, there's one kind of pressure that stands heads above the others, and goes criminally overlooked in most product strategies: *people* pressure.

## **Who else has to be successful for adoption to succeed?**

While it's crucial to understand what makes your “onboarder” tick, there's no need to stop there. People are social animals, and understanding an individual's motivations often requires understanding the motivations of those around them.

Nowhere is this truer than in the land of business software. Budgets need to be approved, technology needs to be reviewed, processes need to be changed and colleagues need to be trained. Understanding what motivates the budget-holders and technology-reviewers in your user's life can help you ensure things get past all those surrounding parties as quickly and easily as possible.

If it comes up in an interview that their managers wanted an explanation of why a product was worth the investment, arming future users with a professional and credible PDF outlining the return on investment (ROI) of your product will beat leaving them to come up with reasons on their own. If you frequently hear the IT department nearly scrubbed the deal with their technical review, you can save untold others from the chopping block with a well-timed offer of a guided tour under the hood.

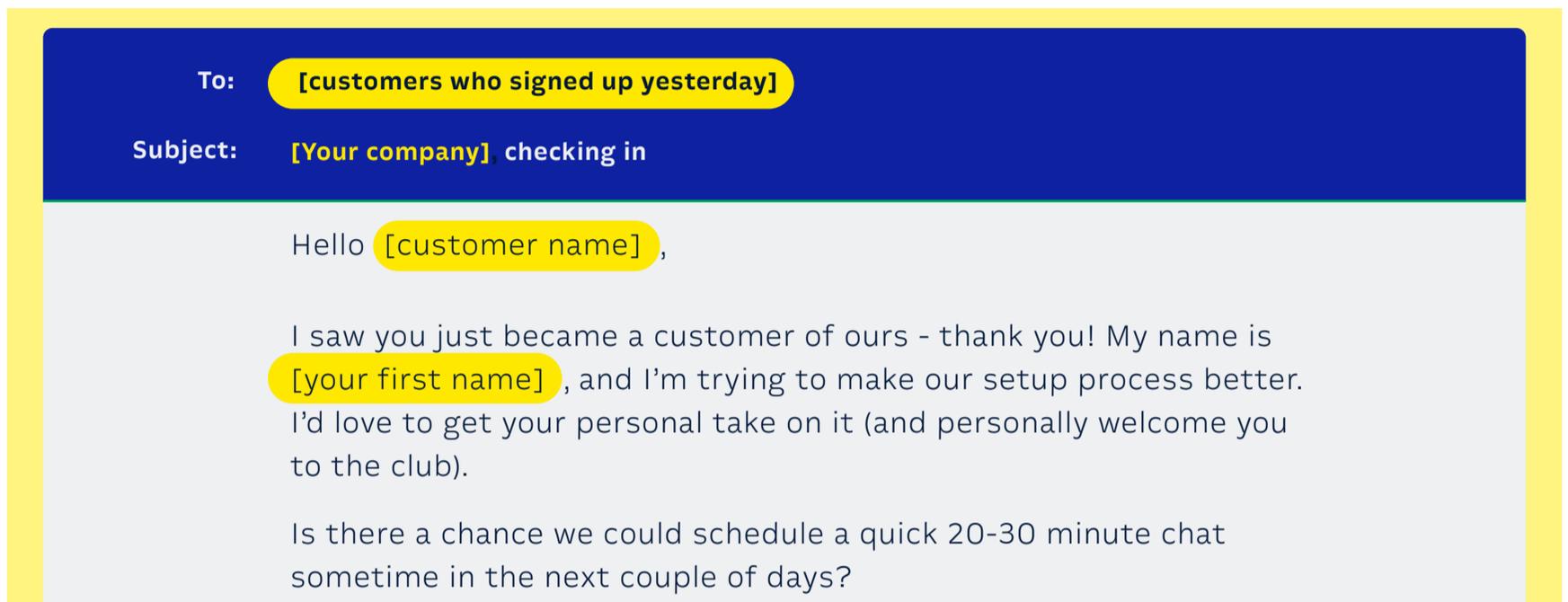
Ask as many questions as possible about who applied pressure to the process, and what pressures those people were dealing with themselves. Teeing your user up for success doesn't – and shouldn't – have to exist solely within the confines of your product's interface.

## **Go forth and listen**

The insights that create an exceptional onboarding experience are out there, but won't fall into your lap from a Google Analytics chart or an open text box

tacked onto an NPS survey. To uncover the real story – the powerful, driving, emotional one – you have to access the person behind the user.

In fact, I want you to do this so much I'm sharing a time-tested email of mine so you can get started right away. Send this to people the day after they become customers (or cross the engagement proxy):



Not everyone will reply, but I guarantee some will, and the hardest part of interviewing – getting people to talk with you – will be covered. Once you have them on the line, make sure to remember these points:

- In order for your onboarding to succeed, it has to make your users successful.
- People sign up for products because they're frustrated with their current situation.
- The frustrations are the key early motivators, and are uncovered by interviewing people who have recently made the switch.
- The interviews should always skew towards real events and feelings, rather than abstract or presumed ones.
- Track the initial motivations back as far as possible, then move forward with as many specifics as possible.

- Take the scenic route – color and commentary is a very valuable resource.
- Catalog and overcome outside stumbling blocks and hurdles, be they software or people.
- The story starts at “frustrating situation” and ends at “successful situation” – make sure all the dots connect!

Interviewing isn't easy, but it's a heck of a lot more enjoyable than pouring tons of late nights and hard-earned dollars into a product that's sucking wind. Here's to your onboarding (and your users') success.





**CHAPTER 04**

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# A content-first approach to product onboarding

*Jonathon Colman*



**K**nowing your user's story is central to a great onboarding experience, as Samuel Hulick has established – but how do you actually tell that story? At some point you need to write the content of your onboarding: words, sentences, value props, the works. Ultimately, it's the content that helps your users achieve their goals.

That's a lot of heavy lifting for just a few bits of text. As it turns out, writing your onboarding is a real job, and it's often harder than you might think. The hardest part of all is figuring out where to start.

Here's an approach and a few tools that make it easier to write a great onboarding experience.

## **Content problems vs product problems**

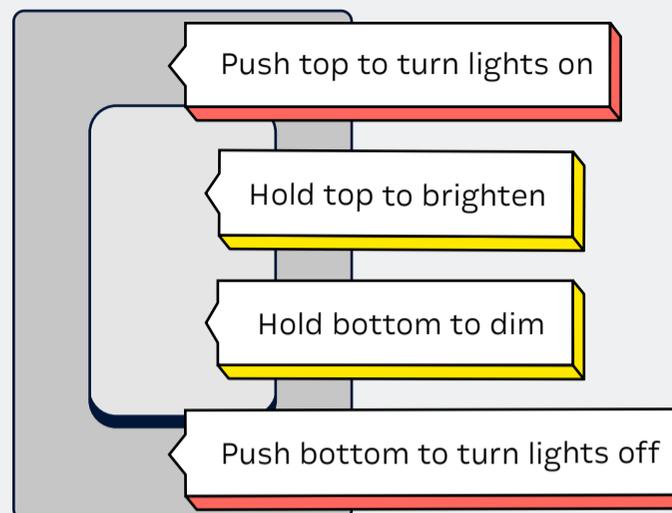
Without content, your onboarding would be a bunch of empty boxes and arrows on top of your product. It's the content – the actual words – that helps people understand what your product does, find out why it might be valuable to them and learn how to use it.

Unfortunately, many product teams tend to approach content as their lowest priority – and it shows. Even if it's well-written, it sounds wrong and works wrong: it's focused on highlighting product features rather than showing people what they can achieve by using them.

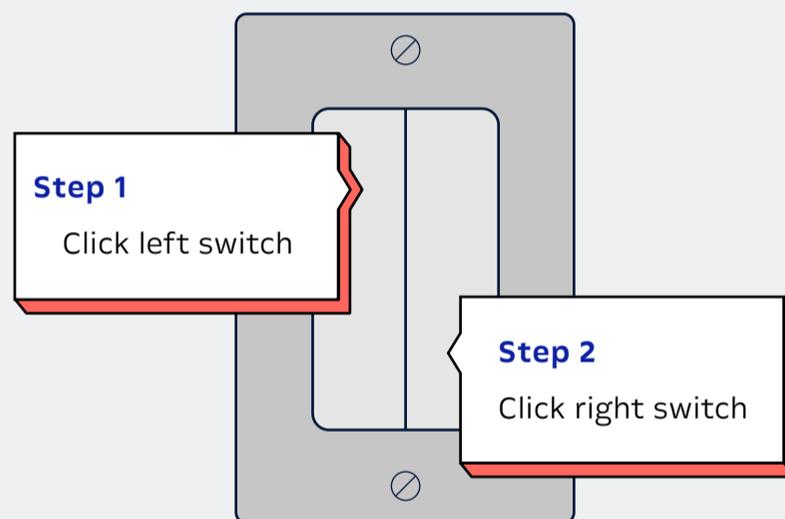
These problems are expensive to fix because your team has sunk a lot of time into designing your onboarding flow. But when content is the lowest priority, you might assume that the poor performance of your onboarding is due to bad content that can be solved quickly and cheaply by “making the words better.”

Instead, you should reconsider this as being a product problem. For example, consider these signs I spotted beside some light switches a few years ago:

### Dimmer switch operation



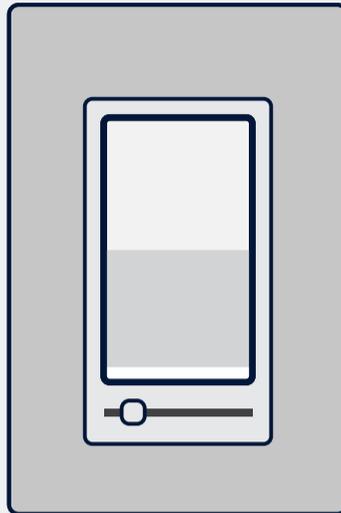
### To turn on the lights when lights are off



This is what it looks like when you try to solve a product problem with content after the product's already been built. No one could understand how the light switches worked, so someone designed a guide (onboarding!) with instructions so that their colleagues could use the lights.

These switches required dozens of words of explanation! And it's not the content's fault that these switches are so hard to use – it's the product's fault. Especially when the problem of designing a usable dimmer light switch has been solved for decades:

Light switch with dimmer



Content makes a terrible bandage for a broken product. What if you approached your onboarding experience by thinking about the content first? That way, you'd know your user's story and their goals before building anything. This lets you design the experience around that story rather than bolting it on afterwards.

## Create a narrative for your users' journey

Narrative is the structure you put into place that dictates how the story of your product is told. It's also the frame by which you want people to see your product. That's why it's helpful to build your narrative before you write a word of your onboarding flow so that you can keep it focused on the things that really matter for your users.

### Bad narratives focus on the product

Even if you've never thought about narrative before, you know a bad one when you see it. A product narrative that focuses on the company ("Look at this hard work we did!") instead of the users is a classic example. Others include:

- **Lack of clarity:** A story where the subjects, the context they're in, or the outcomes of their actions are unclear.

Product narratives need to be crisp and focused for people to understand what the product does, how they should use it, and why.

- **Too abstract or detailed:** A story focused on ideas without the details that make those ideas concrete. Vice-versa, a story that's overly focused on the details without any big ideas to link them together. You need a balance of abstract ideas and concrete details for people to understand your product.
- **No structure:** A story told out of order, where the effects come before the causes. This might be a fantastic way to tell a story in a movie or time-travel novel, but not so much for a product.
- **Doesn't deliver:** A story that seems to promise something really exciting or interesting to you, but never delivers on it. How many products have you used that don't live up to their expectations? Likely far too many.
- **Too long:** A story that doesn't end, but rather drones on and on for so long that you forget why you're paying attention to it in the first place. Product onboarding that lasts for more than a handful of steps often leads to steep abandonment.

I'm sure you've experienced product onboarding that makes mistakes like these (and likely several others). All of these examples show you how the structure of the story influences how that story is understood, perceived, and results in the desired outcomes. So if you want to get the actual words in your onboarding flow right, you need to first put a strong structure, a strong narrative, into place.

## Great narratives focus on the users' needs

To build a compelling narrative, you need to first understand your customer's journey and the Job-to-be-Done. What's the context of their needs that brought them to your product? What problems do they experience? What are the tasks that your customers need to be successful at in order to see value? And what will your customers achieve if they complete those tasks?

You can answer these questions by talking with your users and observing them experiencing these problems in context. Doing this helps you discover something fascinating: *“People don’t buy products; they buy better versions of themselves,”* as Samuel Hulick puts it. So motivation is a key factor in creating a strong product narrative – you need to be able to show people how using your product helps them become better versions of themselves.

Putting this all together: when a person uses a product, we have the situation they’re in (the context), their motivation to use the product (the need or problem they have), and the outcome they want (the better version of themselves). Combined, this is the basis for your narrative.

Here’s a table that you can use to link together all of your narrative elements into a complete user journey:

<b>Narrative element</b>	<b>Example</b>
<b>Situation and context</b>	I use my personal credit card for work purchases a lot. I get reimbursed for them, but I never know how much they’re going to cost because it’s hard to track my purchases.
<b>Motivation to use the product</b>	I don’t want to pay my bills late or rack up a lot of interest charges, penalties, or debt. I do want a quick way to see my personal purchases and separate them from my corporate purchases.
<b>Actions taken</b>	I downloaded an app from my bank to help me track and categorize my spending. I set up alerts to make sure I pay bills on time and seek reimbursement from my employer immediately. This helped me create my first real budget.
<b>Desired outcomes</b>	I manage my finances so well that I don’t feel anxious. I’m not constantly worried about running out of money, so I’m more generous with my friends and family.
<b>Proof points</b>	<ul style="list-style-type: none"> <li>• I know what I’ve bought, when, and for whom.</li> <li>• I’m quickly reimbursed by my employer.</li> <li>• I don’t have any penalties from late credit card payments.</li> <li>• I’m carrying less debt than usual.</li> <li>• I never overspend, even though I’m spending more on others.</li> </ul>

Now that your story has a narrative structure in place, you're ready to focus on the elements that help people succeed as they learn how to use your product.

## **The 6 key elements of an effective onboarding flow**

As part of our product research at Intercom, we've reviewed the onboarding flows of hundreds of software products. These products are in a number of diverse industries, solve a range of problems from simple to complex, have onboarding as short as one screen and as long as over 70 steps (yes, really!).

No matter the approach, all of these onboarding flows had six elements in common:

### **1. A welcome message.**

This should warmly greet your users, helping them feel valued and recognized.

### **2. An identity for the product or company.**

This helps build an understanding of how your users should consider the experience of interacting with your product.

### **3. A problem(s) to be solved.**

This helps create a strong connection with your users because they see themselves reflected in it.

### **4. At least one explicit value proposal.**

This is the promise your company makes, setting a clear expectation for what users will get out of the product.

## 5. The mechanics of using the product.

Whether it's a conversation with a bot, a video, a series of pointers, or static text, this walks your users through how to use the product.

## 6. At least one call to action.

Maybe it's creating something, entering data, or taking some other action, but the best onboarding flows don't stop at explaining the product interface – they go the extra mile to make sure people are prompted to start using it effectively.

These are the standard elements of effective onboarding that you should include in your product. In order to set up your users for success, each of these elements will play a role, and if for any reason your onboarding flow is missing one or more of these elements, determine where and how you can incorporate it. A flow that is missing any of these elements is incomplete and both your business and your users will suffer from the absence.

With your narrative and content elements in place, you can focus on how you deliver content to your users in your onboarding flow – and how that content is understood and felt.

## **Use voice and tone to speak in a way people can hear**

Once you have a narrative that acts as a foundation for your onboarding, then you can start writing content that fills in the structure of your narrative. But this is easier said than done. How should your writing sound?

A product's voice is the personality and character that comes through in its communication – including the writing in its onboarding flows. The voice of a product should be distinctive and consistent because it's a big part of the overall brand and experience.

We often document a company or product's voice by determining what it should always and should never sound like. You can create these guidelines by interviewing your leaders and other decision-makers as well as the people who have been in the company the longest. Here's a table that you can use to define rules for the voice of your product:

<b>We always sound:</b>	<b>We never sound:</b>	<b>So that our customers...</b>
Confident	Arrogant	Know they're making the best decisions
Playful	Distracting	Have fun while still being efficient and effective
Like a caring coach	Like an aloof robot	Feel supported in taking their next steps

Now if your voice is about what you say, then your tone is about how you say it. The right tone helps you understand how to apply your voice based on the context of the situation.

Tone helps us try to understand people's emotions and level of openness to our messages so that we can come across more clearly and effectively. Ideally, this results in our users being better able to hear what we're trying to say and do for them.

Because tone is so focused on the details of your customer's context or situation, it should be reflected in your punctuation, grammar, emoji, photos or GIFs, aspects of your design, and more. Tone goes well beyond just words in terms of connecting with people's emotions.

To start building a system of tones, talk directly with your users about the key scenarios of your product, asking questions about their experience. Here's an example of how this helps you understand a key scenario for a fictitious recipe app:

Questions about the scenario	Example answers
What's happening in the product right now?	The person just opened the app for the very first time
What's the person trying to achieve in the product?	They want to cook dinner for their family over the next half hour and they hope their family enjoys the meal
What's the person feeling at this moment?	Eagerness, anticipation, stress, fear of ruining dinner
How open is the person to the message we want to give them?	Somewhat closed: they'll value the message only if it's clearly linked to their immediate goal
What feelings should be conveyed in our message?	Encouragement, respect, care
What's an example of a message that fits all of these factors?	"In a rush? Don't worry, we've got you covered. Save time with these family favorites."

Learning about your users and describing product scenarios helps you create tone guidance for your product as a whole. These tones help make sure that your product writing addresses people's needs in a way that they can hear.

## Great content helps users reach their goals

A strong structure, focus on the standard elements of success, and using voice and tones effectively all help make your onboarding easier to write and far more useful for your users. Not only that, but you can apply your narrative, content elements and voice and tones all throughout your product experience – not just to onboarding.

By investing in these structures and principles upfront, you can create better content that's more consistent and effective at helping your users reach their goals. Just a little prep and research goes a long way toward scaling your content to meet the needs of your product, users and company.





**CHAPTER 05**

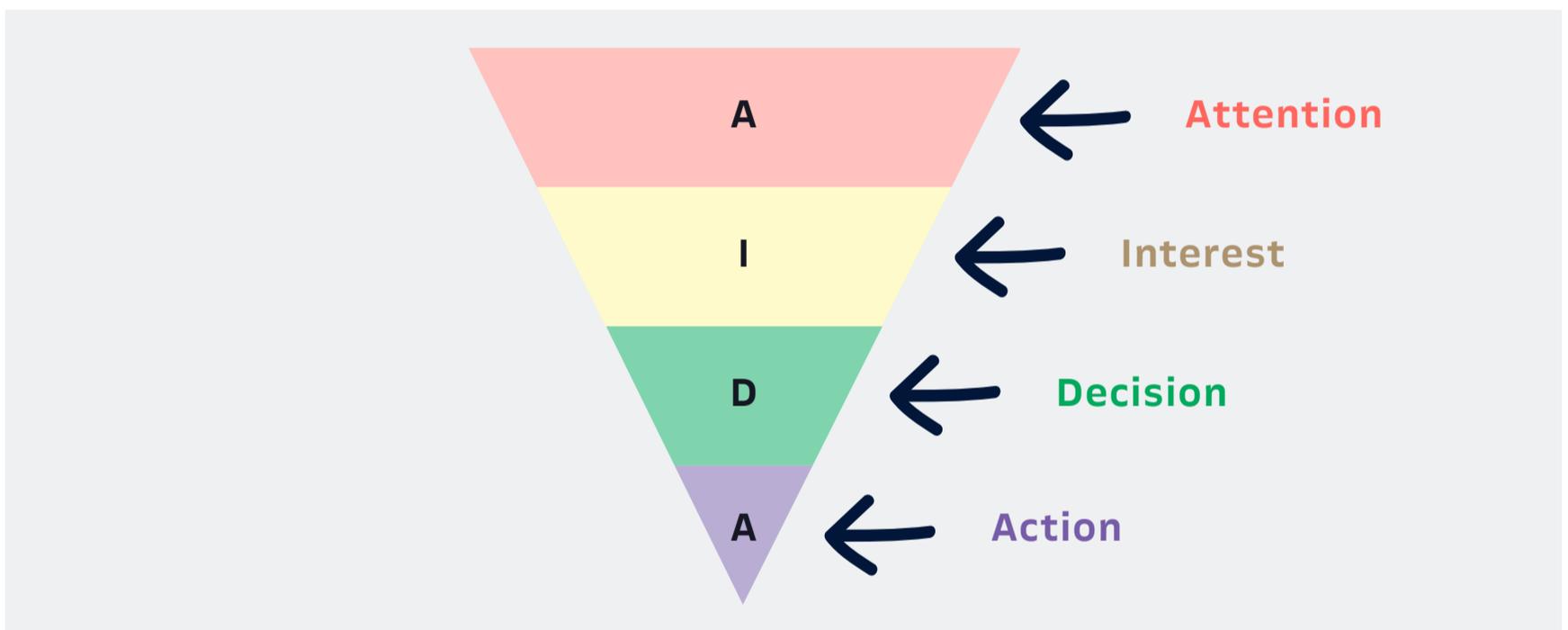
# Hook trial users from their first use

*Robbie Allan*



In 1898, American sales pioneer E. St. Elmo Lewis created the AIDA model to describe how customers buy. The AIDA model described four cognitive phases that buyers follow when accepting a new idea or purchasing a new product:

- A problem comes to the customer's **attention**.
- This creates **interest** in the benefits of a product or service.
- The customer **decides** to buy the product.
- They take **action** to complete the purchase.



Today, Lewis' AIDA model is featured everywhere: from Marketing 101 courses to Alec Baldwin's famous scene in *Glengarry Glen Ross*. This acronym has endured because of its simplicity and accuracy. Now, AIDA describes how most things are bought: groceries, apparel, cars – you name it.

But AIDA originated before the birth of digital products. Today, signing up for a social network or SaaS product requires little or no purchase commitment from the buyer. Many products offer a free trial, require a minimal month-to-month commitment or are completely free.

# AIDA gets a digital makeover

Gone are the days of long feature lists and spec sheets. Instead, marketers today use their websites to generate just enough interest for a prospective customer to start a trial. Marketing websites describe a product's key differentiators and benefits, offer a few case studies and encourage a prospective customer to evaluate the product by using it.

For digital products, it's no longer A-I-D-A, it's become A-I-A-D. Users take the **action** of signing up for your product before they make the **decision** to buy it.

This means that while some users who start a trial will be intent on purchasing your product, many more will be early in the buying process and are using the trial to both understand their own needs and whether your product can help them.

If you're going to convince these early-in-the-process buyers to stay beyond their first use, the experience needs to get them hooked. The first use flow should help them experience the value your product can offer them. But it has to do this while asking very little in return. After all, these prospective customers are not invested in your company or product – yet.

At Intercom, three core principles help us create a first use experience that converts lower-intent buyers into loyal customers:

1. Focus on the job customers want to do.
2. Show rather than tell.
3. Remove all non-essential steps.

## Focus on the job your customers want to do

First, we use the Jobs-to-be-Done (JTBD) framework to understand the value our customers seek to get out of a product. JTBD highlights how customers buy a product to solve a problem. Great onboarding starts with a

clear understanding of what problem your customers buy your product to solve. The first use experience should help trial users solve their problem.

For example, when someone fires up a video game after a long day, their Job-to-be-Done is to be entertained and distracted by their pursuit of success. Video games lead the way in great onboarding, guiding first time users to early success, and highlighting the fun of the game in a lightweight way.

With the customer's Job-to-be-Done as a baseline, structure your first use experience around highlighting the features in your product that deliver on this job.

It's unlikely that your product's navigation or UI is organized in this way: features and screens in your product don't typically map neatly to user benefits. While it's important to explain the hierarchy and organization of your product, dragging low-intent buyers through all this puts the cart before the horse. Showing customers how to find and use every feature is an important part of onboarding, but it's best saved for later.

## **Show rather than tell**

A great first use is one in which the user gets an “aha” moment: the point of delight where the product proves to a user that it offers them real value. There are lots of ways to prove value, but most fall into doing, showing and telling. If you can actually deliver on the value, that's best. Consumer products tend to focus on this: getting a new user to add friends, pin content or take their first ride.

For products with a long path to value, this is often difficult. In this circumstance, it's critical to get as close to the experience of value as possible. Make it as realistic, specific and tangible for new users as you can.

Airbnb might not be a complex piece of business software, but it does have a long path to value for the people who list homes on their website. A new user has to upload a long list of details about their home, take photos, set prices and availability.

To motivate new users through this process, Airbnb focuses on the user's Job-to-be-Done: make money from my empty house or room. Right on its initial signup screen, Airbnb displays “estimated monthly earnings” based on your location and home type. This very specific estimate makes the benefit of its service feel real to new users, and helps motivate them to complete the signup flow.

## **Remove all non-essential steps**

Once you've identified what value looks like, the next step is to find the shortest path to get new users to experience it. Unlike customers who have already decided to buy, most new users are still evaluating your product, and the competition is only a few clicks away.

[Scott Belsky](#), Chief Product Officer at Adobe, puts it bluntly: “In the first 15 seconds of every new experience, people are lazy, vain and selfish.” He means that new users aren't invested in your product, so it's critical that you show them value immediately in their first use.

To deliver the most effective first use experience, remove all barriers that get in the way of new customers experiencing value. This minimum viable flow will vary by customer segment and use case, so make sure you customize your onboarding for each segment.

Common and effective patterns for removing effort from setup are:

- Templates that reduce many configuration options to a few simple choices.
- Presumptuous defaults that eliminate steps entirely.

Typeform, an online survey product, goes so far as to remove the account creation step from their first use experience. When new users click “Get started,” they're encouraged to create a survey right away. Only once they opt to save their work are they prompted to create an account, after they've experienced the value of the product.

# Provide maximum value with minimum effort

The goal of a first use experience is to set prospective users on the path to being happy, retained customers. In the era of A-I-A-D, most new users have yet to decide whether they'll buy your product. Your first use experience needs to convince them that your product will provide value to them, and to prove this with minimal effort.

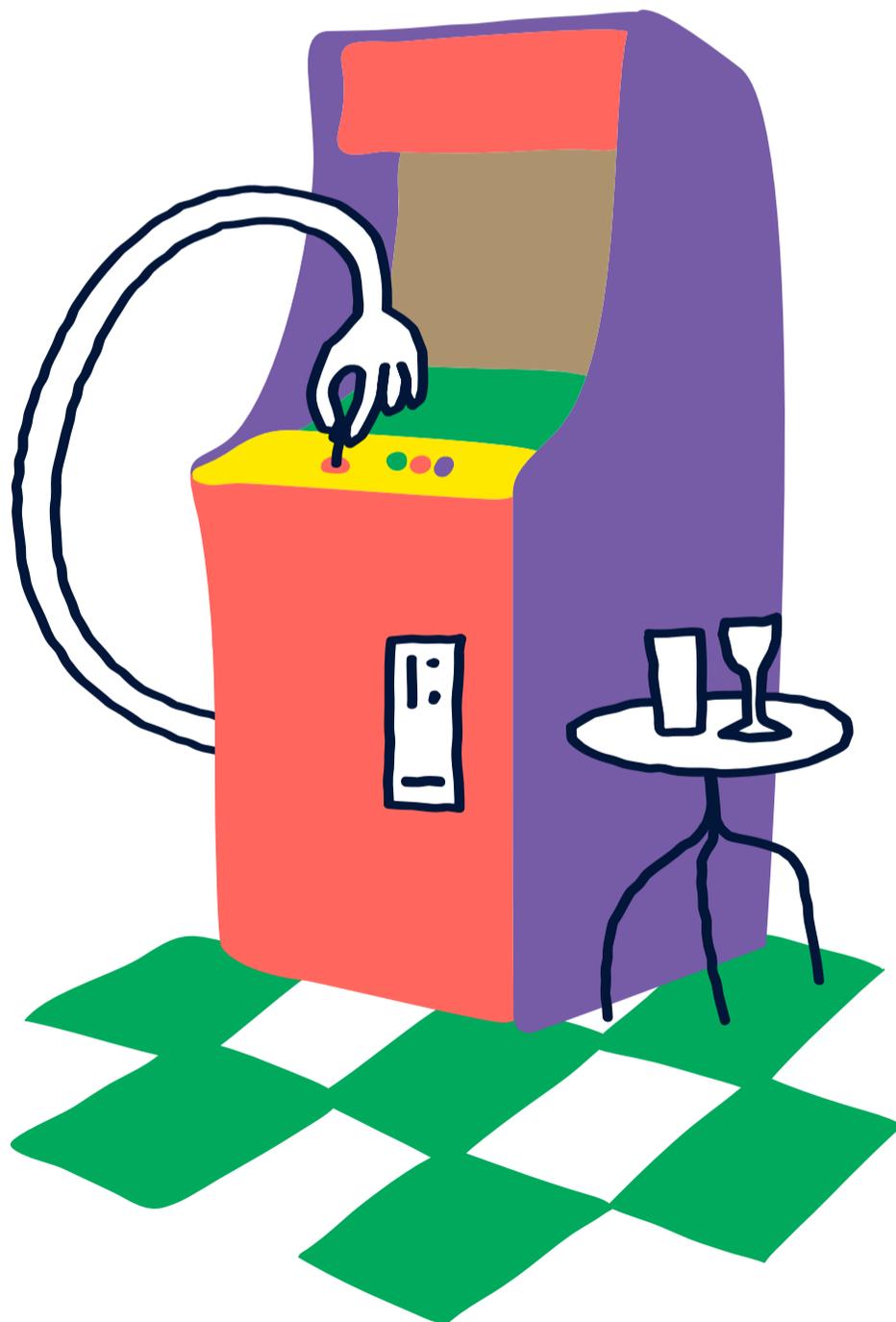
Achieving this demands a first use experience that's more than the usual tour through the settings screen, but your customers will ultimately thank you for it.





# Making the best first impression

*Danielle Swanser*



**A**s the saying goes, “You never get a second chance to make a good first impression.” So the obligation to make first impressions positive and memorable is immense.

This is especially true for onboarding. Great onboarding is multifaceted. Like the early stages of a burgeoning relationship, multiple steps shape the outcome and determine whether the relationship between you and the user will be a wild success, an unremarkable encounter or a dismal failure.

The goal of onboarding isn’t to show new users where features are. Instead, it’s to guide users towards their “aha” moment, the moment of delight where the value of your product becomes immediately clear.

As Ruairí explained earlier, three core components make up successful onboarding:

1. UI design patterns.
2. Contextual educational content.
3. Contextual communication.

It is vital to consider how these components interact throughout the customer lifecycle and in different channels, but they should also come together in that very first impression, the moment of first use.

A positive first impression that shows the true value of your product sets the tone for a fruitful, long-lasting relationship with your user.

## **Get to know your customers’ needs**

To build that lasting first impression, first understand the actions your users should take and how to motivate them. Answer these questions:

- What do you need to know about your users to provide them with a great experience?
- What do users need to do to get value from your app?
- What are the costs and benefits of adding friction to your onboarding?
- How will you motivate users to complete onboarding?
- At what point in your users' lifecycle does onboarding need to be completed?
- What actions must your users take regularly to drive growth and revenue?

Answering these questions takes time and experimentation, but it pays to consider the answers as you craft the very first encounter users will have with your product. Those first impressions will define so much of the relationship to come, so do everything you can to make it the start of something beautiful.

## **Useful UI design patterns**

Once you've determined what your first use experience needs to achieve, it's time to consider the UI design patterns you can use to create that experience.

Put yourself in the shoes of a potential customer. The first time someone uses your product, they're likely a little disoriented as they attempt to familiarize themselves with the new environment – your app's UI. They'll be searching for cues to find their way.

UI design patterns like empty states and inline hints and tips can help make the unfamiliar feel familiar and get the user to see value, fast. Let's run through the most useful patterns.

## Welcome message

It might seem incredibly simple but a considered welcome message can make or break your tour. This is your first opportunity to greet your new user, so it's important to be warm and approachable and give them a reason to engage.

## Modal

PHIL FROM INTERCOM

Hi Zara! I'm Phil from Intercom. I'm here to help you get set up and talking with your customers. Let's go!

A large window that takes priority on your screen, most often dimming the background, the modal is an effective design pattern for focusing the user's attention. But it may come across as noisy if not used well. You'll often see a modal when you sign up for a product and are asked for your email address.

Modal windows work well with contextual educational content like videos or GIFs. However, if you're referencing a specific element within your app, the focus should be on that element, not on the modal.

## Empty state

Empty states are how your app or product looks on first use before it's filled with user content. An empty product or app can appear like a blank page to a novice writer – it can feel overwhelming. Not only are users trying to get oriented with this new space, they're excited to jump in and get started, but they need guidance and reassurance on how to proceed. However, a well-designed “empty state” design pattern can offer reassurance by providing context and setting expectations, guiding the user to fill in content and take important steps.

Rather than leaving an intimidating void, an empty state design ideally prompts the user to begin filling in the content. Or it can include sample content to illustrate the app's value and help the user feel more confident about taking the next step. With Intercom, the first time users sign in, they're presented with sample messages they can edit and send.

Hey [First name],

[Author name] here from [App name]. I'm just dropping you a line to see how [App name] is working out for you.

If you have any questions about the product, or any feedback, just reply and let us know. We're always happy to help.

Thanks!

[Author full name]

## Inline hints and tips

Inline hints and tips are subtle and look as though they fit in with the rest of the content on the page. Their subtlety is what sets them apart from the other UI design pattern. As a result, they should be used to enhance a user's success in your product, for instance by providing additional information about a complex feature or best practice tip.

### TEAM INTRO

Introduce your team and write a couple of sentences about your team.

Tell people how you can help

To pick the best UI pattern for your message, consider a content hierarchy. Is this a “need to know” or a “nice to know” tip?

## **Tooltips**

Traditional tooltips are text labels that appear when a user hovers over a field, link or UI element, and disappear when a user moves their pointer away.

They’re always available for users to access, so you can consider them as a consistent part of the UI that’s occasionally visible and available beyond the first use onboarding experience. Tooltips can be effective for explaining a feature a user may use or an action they might take.

Use these sparingly and keep them subtle, so users can focus on taking the most important onboarding actions in your product. Above all, avoid the temptation of relying on tooltips as a substitute for well-designed interface elements.

## **Interactive tours**

Interactive product tours excel at helping users overcome those early moments of disorientation in a new app. Product tours are usually action-driven pointer messages that look similar to tooltips, but rather than being available as a consistent part of the UI, they appear only during an onboarding experience.

They point out critical UI areas that the user needs to interact with to achieve their goal. For more complex products, action-driven messages help connect the dots throughout the tour to keep users engaged until the end. They prompt users to take relevant actions throughout the tour, like creating a heading for a blog post or clicking on a button to go to the next page.

But before showing the tour, you should first ask yourself if new users need to take this tour right now. If it is, make sure it’s relevant to getting the user started in the product and set expectations correctly by explaining what the learning outcomes will be.

However, give your users the option to start the tour at a later point. Make it discoverable in your help docs or resource section on your website so they can take it at another time.

## **How Product Tours leverages user context**

These design patterns are by no means a definitive or ranked list, but they're the most common patterns used for onboarding. However, too often they're implemented without any user context, a core aspect of effective onboarding.

Without user context, these patterns become a one-size-fits-all tactic that relies on assumptions about the “average user,” rather than the individual you're engaging with.

We recently developed our own version of interactive tours, called Product Tours. As we developed Product Tours, we came to realize the powerful user context that the Intercom platform can infuse into those critical moments of first use, with its wealth of user data.

That context can be as simple as dynamically addressing the user by name, which adds a warm personal feel. Or it can be as sophisticated as tailoring a Product Tour to the customer's specific use case.

Moreover, Product Tours can be used throughout the customer lifecycle. You can trigger tours based on who your users are, where they are in your product and what they've done – in fact, you can use just about any data you store in Intercom to customize your tours. This makes sure that the tours you send are always in context and triggered at just the right time.

With contextually triggered Product Tours, you can now be confident that your users will always have the content they need, when they need it, for the exact task they're doing. For more complex processes, enhance your tour with video content, GIFs or images to walk users through the task at hand.

Let's return to the three core components of successful onboarding: UI design patterns, contextual educational content and contextual communication.

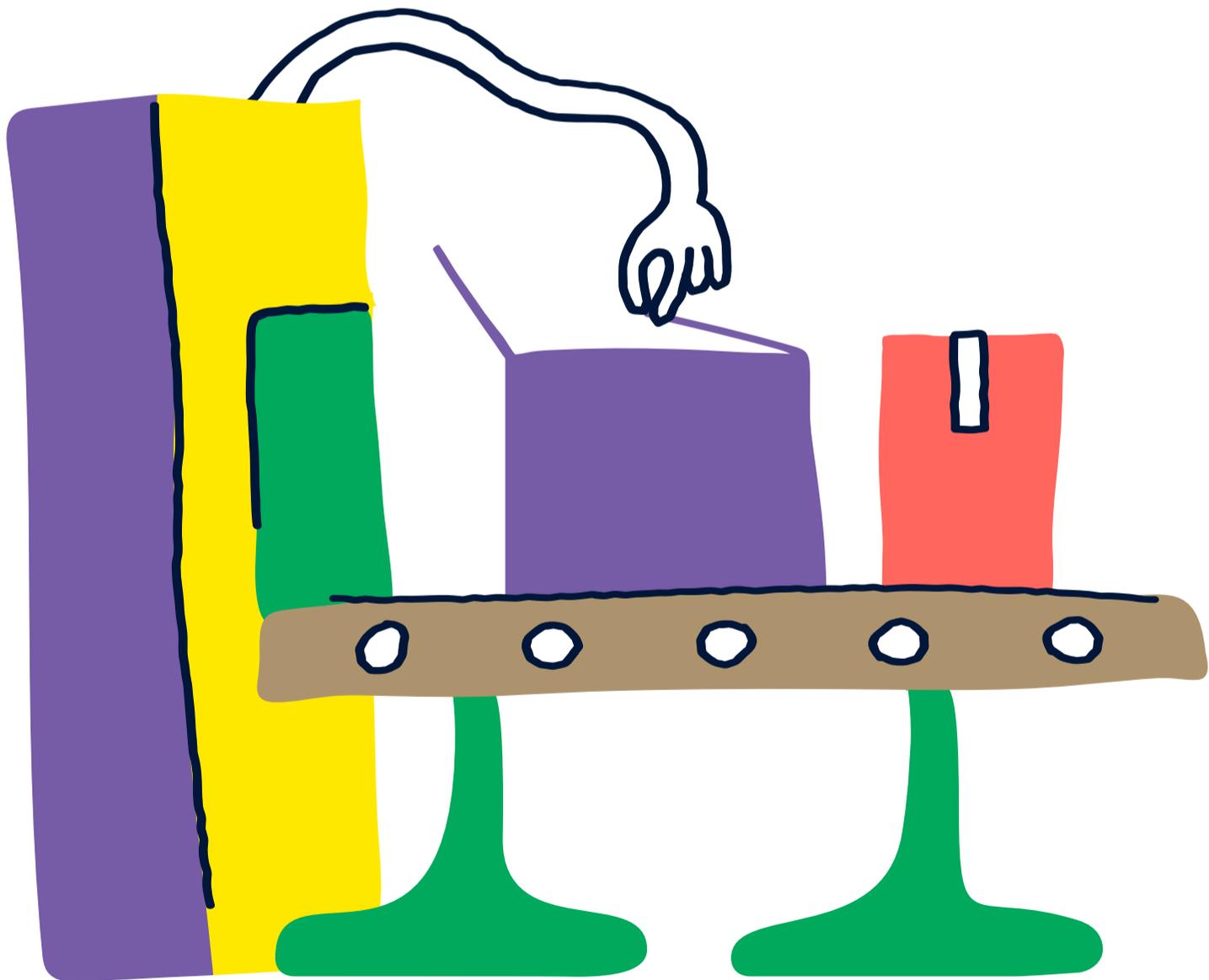
Product Tours and the Intercom platform combine all three into one seamless experience. Previously, UI design patterns lacked a lot of context, educational content was siloed in the help docs, and communication was based on the movements of the average user, rather than the actual user. Now they can be interwoven to build a much more powerful onboarding experience.





# Streamline onboarding for complex products

*Robbie Allan*

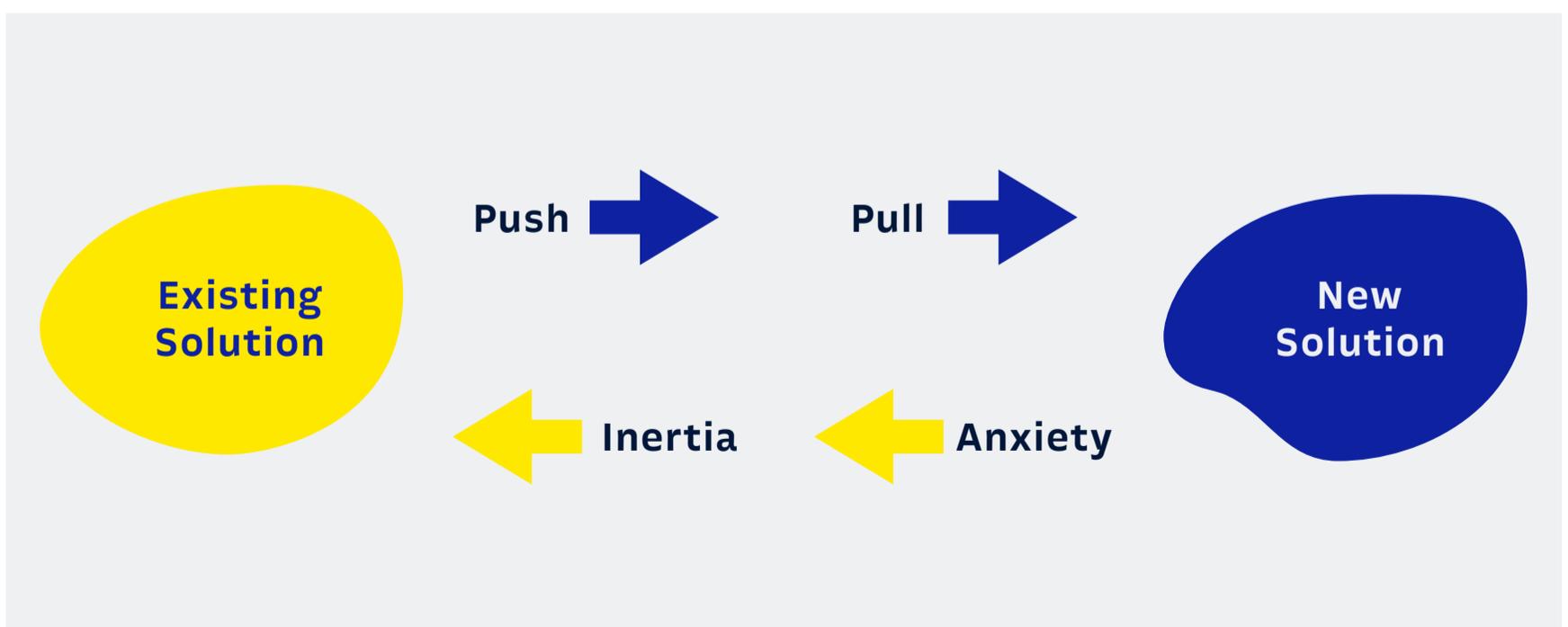


A great onboarding experience is one that proves to new users that your product will help them do the job that they want. To put it another way, the ideal onboarding experience is a short, easy and frictionless path to finding value.

Of course, many products have unavoidable complexity. If getting started with your product requires new users to install software, invite colleagues or message customers, then the path to value may not seem as short or straightforward. In cases like these, the path from signup to realizing value can be long and arduous and can cause your funnel to leak users. That's why all high stakes steps deserve care and thought, and possibly internal review and approval.

New users who drop off during onboarding believe that the value of a product isn't worth the cost of continuing. There are four forces that affect a user's decision to choose and stick to a particular product:

- The **push** to find a new solution due to current problems.
- The **pull** from what could be achieved with this new product.
- The **inertia** of not wanting to change.
- The **anxiety** around the risks of moving to a new product.



To onboard customers successfully to a complex product, you'll need to understand the push, strengthen the pull, overcome inertia and calm anxiety.

## **Understand the push**

### **Be aware of pain points**

You can't control the pain points of a customer's existing solution; that's what's prompting them to try your product in the first place. But you should be aware of the pain points posed by alternative solutions so you can more precisely signal the unique value you offer. Only by having a sense of what people's push forces look like can you successfully tailor your pull message to them.

## **Strengthen the pull**

### **Explain the benefit of each onboarding task**

Adopting a new product takes time and effort. Plus, while new users are onboarding, the noise and distractions of day-to-day work are still competing for their time and attention. It's your job to cut through that noise and enhance the pull to your product by explaining the benefit of completing each onboarding task.

To cite an Intercom example, when encouraging users to create their first Custom Bot, we present two templates to choose from along with text focusing on the job they can do – “Capture, qualify and assign leads for your sales team” and “Generate leads while you're out of the office” – rather than pointing out elements of the UI.



#### Sales qualification template

Capture, qualify and assign leads for your sales team



#### Out of office template

Generate leads while you're out of the office

Your aim is always to keep users progressing through your onboarding experience and there are a number of ways you can make the benefits of onboarding even more compelling:

- Provide hard claims (like the insurance company who promises that 15 minutes could save you 15% or more on car insurance).
- Show social proof (like relevant customer testimonials or the number of people who have completed a specific task).

By describing why a new user should take action in a compelling way, you increase the pull of your product and help these users move one step closer to activation.

## Tailor onboarding for all stakeholders

Many complex products involve multiple stakeholders. Maybe the buyer isn't the user or maybe there are multiple users. Some of these stakeholders will likely have different reasons to adopt your product. To pull these stakeholders to your product, you need to help everyone in the group find success by speaking to each stakeholder's individual needs.

Start by identifying the primary Job-to-be-Done for each stakeholder. For example, imagine a product that helps generate more sales leads from websites. In this case, there could be three different stakeholders:

- A marketing leader will care about how many leads are generated.
- A sales leader will care about leads too, but they'll want high-quality leads and to increase the efficiency of their sales team.
- A salesperson will want to talk to more high-quality leads and close more deals. Their compensation depends on it.

The value of the product differs for each of these stakeholders, so to pull them towards your product effectively their onboarding experiences should also differ. You'll need to separately highlight the features that are most relevant to each of them.

## **Overcome inertia**

### **Provide guidance for complicated tasks**

To get value from a complex product, a new user needs to do work that's beyond just configuring the product itself. These complicated tasks could be things like writing content, deciding which customers to message, or creating a campaign.

These steps often seem simple from the point of view of your product, but can require considerable thought and effort from a new user. It's no surprise that these high effort steps are often the source of greatest leakage for onboarding funnels.

To help your customers succeed with these cognitively demanding tasks, don't present them with a blank page or an overwhelming menu of choices. Avoid inertia by providing simple choices that guide users towards making the decision that's right for them. Intelligent defaults and templates help to reduce the number of choices a user has to make, while how-to content, examples and best practices are a great form of guidance for complicated tasks, like content creation. All of these techniques make

demanding tasks seem more manageable, which in turn, improves the completion rate.

In addition to providing guidance to complete a task, be sure to remind users that they can skip it and come back to it later. You don't want your new users getting stuck trying to compose the perfect push notification during their first experience of your product, you just want them to be aware that this feature exists. Letting users know that they can skip a task will help avoid inertia and maintain momentum.

## **Calm anxiety**

### **Reassure or skip highly visible onboarding steps**

Most people fear public humiliation. The prospect of making a very visible mistake makes everyone anxious. Yet most complex products require new users to take highly visible steps during onboarding. These steps contain an inherent risk of screwing up, like sending the wrong email to VIP customers or spamming every person in your phone's contacts list.

These anxiety-inducing steps can be a barrier to effective onboarding. To avoid losing new users at these critical moments, you should place these higher-stress tasks later in the flow. The first few minutes of a new customer's experience is ideally an effortless demonstration of your product's value. While these visible steps are likely necessary for a customer to get started, they're better introduced after a new user has experienced the benefits of your product and is ready to do what it takes to get started.

A product design that reduces anxiety provides a user with more insight into the action they are about to take. This could be surfacing how many customers a notification will be sent to or adding a button to send a test email. These small features are critical to assure new users that they won't make mistakes, which helps reduce anxiety and improves progression through your onboarding flow.

## **Shorten the path to success for complex products**

Great onboarding should lead new users to value as soon as possible by showing them how your product helps them achieve their goals. For products where the shortest path to value isn't really that short, a great onboarding experience will work to heighten new users' understanding of benefits, increasing the pull of your product by linking onboarding tasks to benefits and creating tailored onboarding experiences for all stakeholders.

A great onboarding experience also helps overcome inertia by guiding new users through complex, cognitively demanding tasks, and reduces anxiety by giving new users ways to better preview what happens when they take a highly visible action. Taken together, these approaches help new users deeply understand the value your product can provide and overcome the emotions that stand in the way of moving forward, no matter how complex it is.



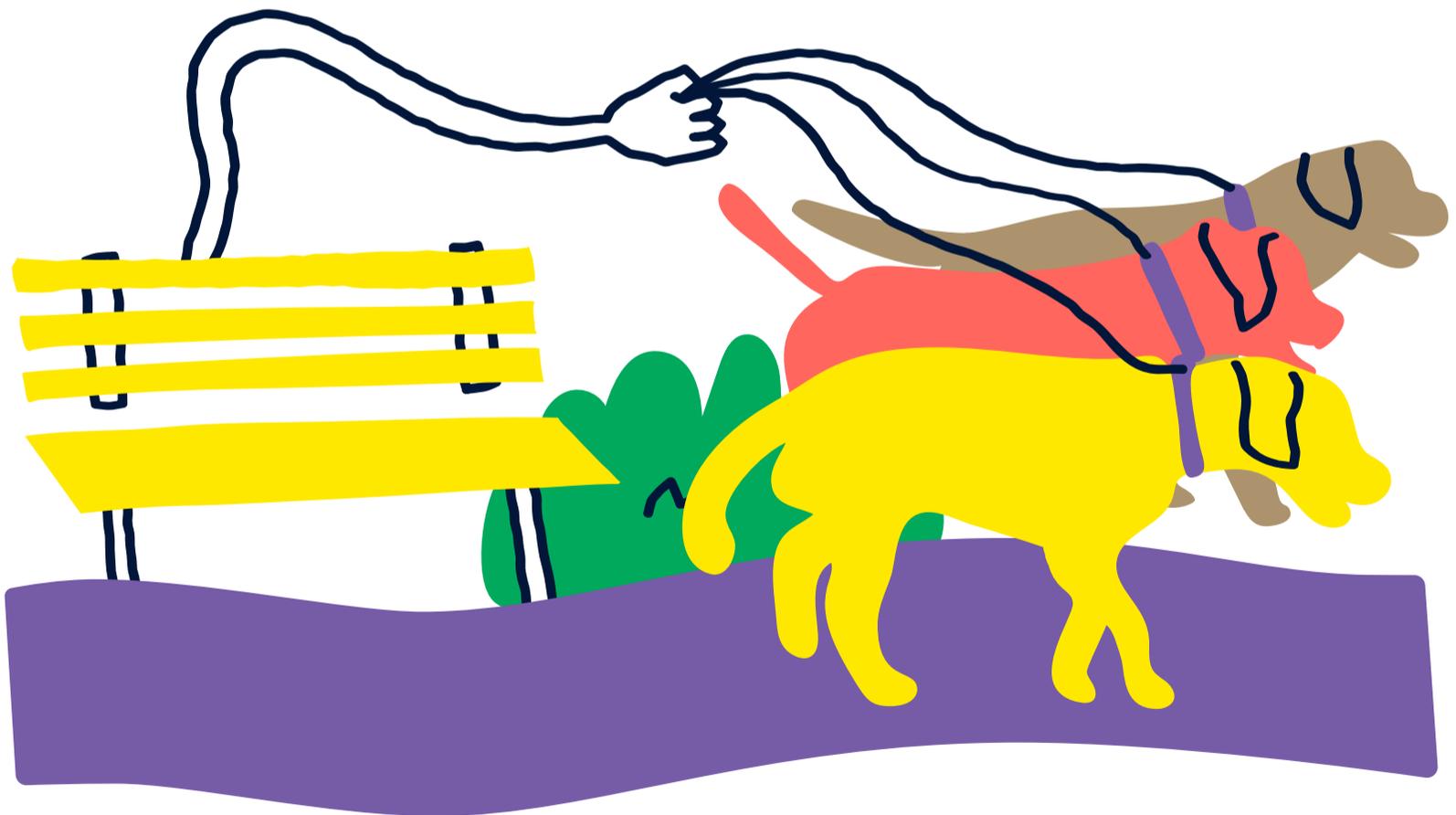


**CHAPTER 08**

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# Onboarding groups, not just individuals

*Brendan Irvine-Broque*



Onboarding a company to your product is different from onboarding an individual user – it requires many people across various departments to get set up and start seeing the value your product can provide.

If you sell your product to businesses and haven't designed your onboarding to support groups of people, you're likely asking people to complete tasks they're not capable of or lack the permissions to do. As your company grows and starts selling to larger companies, rethinking how your onboarding helps groups of people work together will have a greater impact than optimizing an existing step-by-step flow designed for individuals.

That's because onboarding groups of people is fundamentally different to onboarding individuals. Your beautiful, linear sequence of onboarding steps might work well for single users, but teams behave unpredictably. Not every group will have deep technical knowledge and not every group will follow predictable team structures.

So as larger companies start using your product, instead of just asking “How many people made it from step A to step B?”, you might start asking different questions, such as:

- Why would someone in a group be unable to complete this step?
- Who in their company might be able to help them?
- What is blocking them from asking for help?

We've had to ask ourselves these questions as Intercom has grown. Our customers have become increasingly diverse in size, which has affected the order in which we previously expected common actions to be done.

Early on the vast majority of our customers were small startups and our onboarding reflected that – it was designed to help one engineer install a JavaScript snippet. But our customers are no longer just small startups.

We have to onboard companies where it may require more than one person to code, authorize integrations and teach teams how to use our products.

Great onboarding should reflect that different groups of people will take different paths to get started. That's why your onboarding should acknowledge how differently your customers organize themselves and allow them to progress as a team.

## **Design a predictable set of steps for unpredictable groups**

The mistake most companies make is trying to model their onboarding as an ordered series of steps. They have a very definite idea of what steps should be completed in what order. This one linear sequence of steps can quickly break down for groups of people.

Not convinced? Let's say you're building an iPad app for a reception desk that lets guests sign in and notifies employees when they arrive. In order to be set up, a new customer might need to:

- Sign up for an account.
- Enter a credit card to start a trial.
- Authorize Google Apps access to get employee email addresses.
- Add a legal document or NDA for visitors to sign.
- Place the iPad in a stand at the front desk.

Completing all of these requires participation from:

- Someone with access to a company credit card.
- Someone with administrative access to the Google Apps account.
- Legal counsel.
- Office manager(s) or receptionist(s).

At a very small company, this could be just 2–3 people. At a larger company, it could be dozens.

Let's see what happens if you make the mistake of modeling these steps in a linear way. If someone without a company credit card signs up, they'll be stuck on the step where they're asked to enter a credit card. At a company of 100 people, that might be 80% of people who could possibly sign up for your product.

The same holds for the rest of the steps – the potential for failure is massive. Who has permissions to connect Google Apps? Who knows our lawyer's email? Who has the stand for the iPad?

Modeled in this way, as a blocking sequence of steps, there's only one person at the company who could complete every step, unassisted – the CEO. And if the only person at a company who can complete your onboarding is the busiest person, you have a problem.

We had a similar problem at Intercom as we grew. Previously, in order to sign up for an account, we made people add a code snippet or import data from a CSV or third-party service. In some ways, this was great – we were able to show customers Intercom working on their own website or app right away.

But it also meant we blocked anyone who couldn't add a code snippet or import data from doing anything else. Once we changed this to allow anyone to create an account right away, and then add a code snippet or data import afterwards, more people were able to make more progress through our onboarding.

## **Expect unexpected paths**

Since it's hard to predict who will do each task, or which order tasks will be completed in, designing onboarding means designing for a moving target. It requires the humility to know that it will never be perfect. This is especially true for a growing company, whose customers are increasingly diverse and often get larger over time.

It's important to understand where people might diverge from the main path and provide other options, so users are still “following” a guided path.

## **Provide an escape hatch**

While you have someone's attention, allow them to accomplish as much as they are capable of or have permission to do, right away.

It's hard to recapture someone's attention and get them to come back to your product, especially to do something boring, like enter a credit card or create an API key. So while you have their attention, provide ways for them to skip to other steps they can accomplish.

Remember, it's almost always better to let people keep moving and exploring. The conversion rate lost on one small step is made up by the customer's overall progress and comprehension of what your product has to offer.

Provide people with alternatives – your aim should always be to keep people moving and exploring during their onboarding. The conversion rate lost on one small step can be made up by the customer's overall progress and comprehension of what your product has to offer.

## **Unblock steps with invites**

It shouldn't come as a surprise that not everyone will have the ability or permission to complete every step of your onboarding, so you need to provide ways for people to invite others to help.

Prompting people to invite coworkers means asking the customer to give up some of their social capital – you're asking them to ask another person for a favor, to take time to set up an account and learn something new.

That's why it's important to provide some context – explain why someone is receiving an invite and what they've been asked to do. And while it might

look old-school, providing links can give people more direct control over how they choose to invite others.

## **Identify and empower an onboarding leader**

Without organization and leadership, groups of people have a natural entropy – people disagree, have different priorities and get less done. Chances are, trying out your product is the last thing on the roadmap and not something everyone agrees on.

When someone tries your product, it's your job to find a leader and empower them to organize their team around getting set up with your product.

The solution here doesn't always start with building more software or writing code. At Intercom, identifying and empowering an onboarding leader starts with our sales team. Sales teams traditionally try to find the “champion” in a company, the person willing to fight through obstacles to adopt a new product and close the deal. If you're responsible for onboarding, chances are there's a lot you could learn from sales about the questions they ask to identify this person, and the resources they provide to help them convince others on their team.

## **Groups of people rarely follow neat paths**

When it comes to onboarding, it's easy to think everyone will follow the linear paths you've wireframed. But groups of people rarely follow such neat paths. Instead, you should always assume that at each step of your onboarding, the task at hand may be someone else's job. That way, you can build a flexible onboarding that adapts to different kinds of people, and support larger companies too.

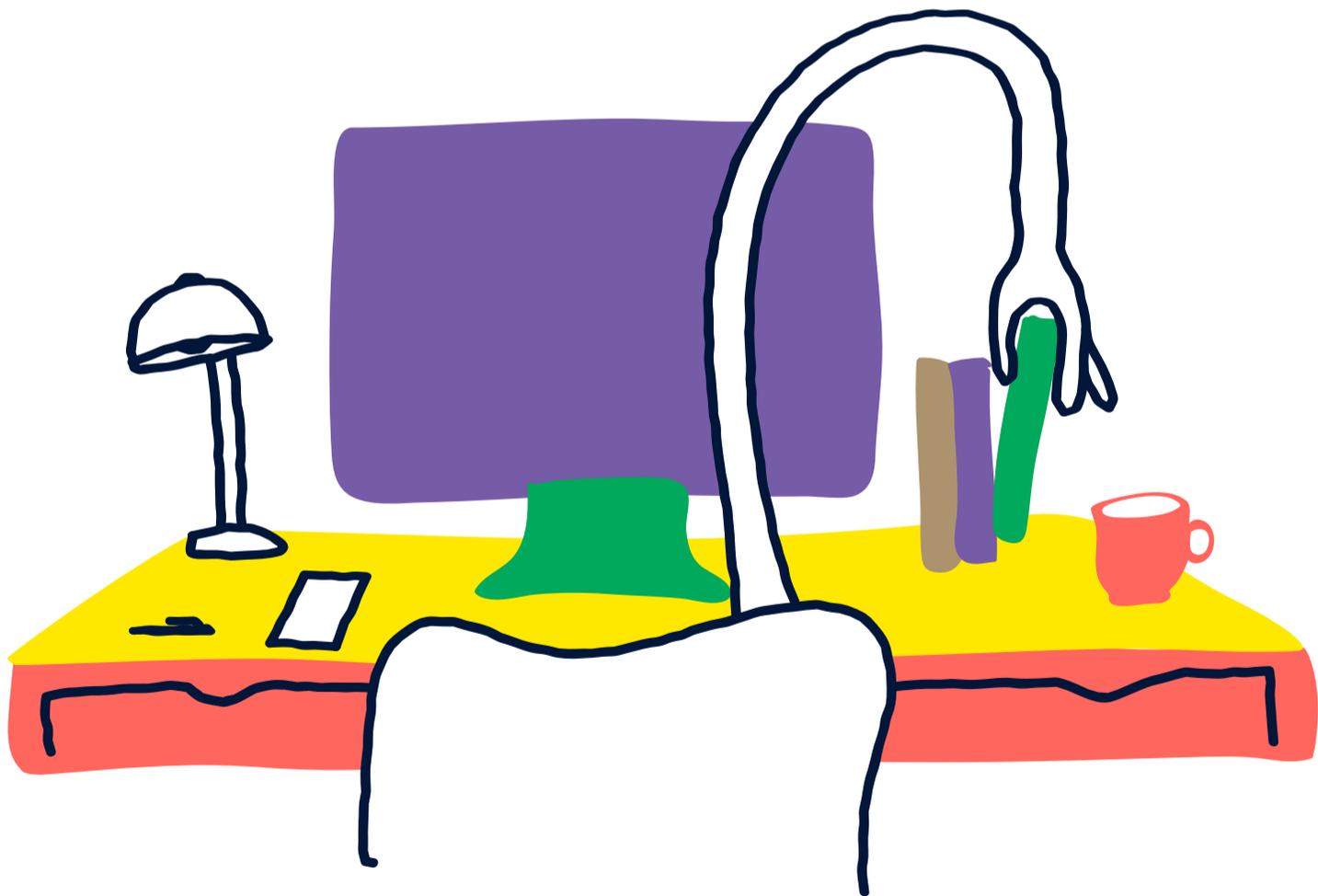




**CHAPTER 09**

# How we designed a modular onboarding system

*Cindy Chang & Siya Yang*



Onboarding is a holistic, ongoing process sitting at the intersection of many different teams: product, sales, marketing, customer engagement and business operations.

A customer's onboarding may start with them visiting your website and choosing to purchase your product or service. But it should also persist as they learn how to use your product and become a confident power user who discovers continued value in your product over time.

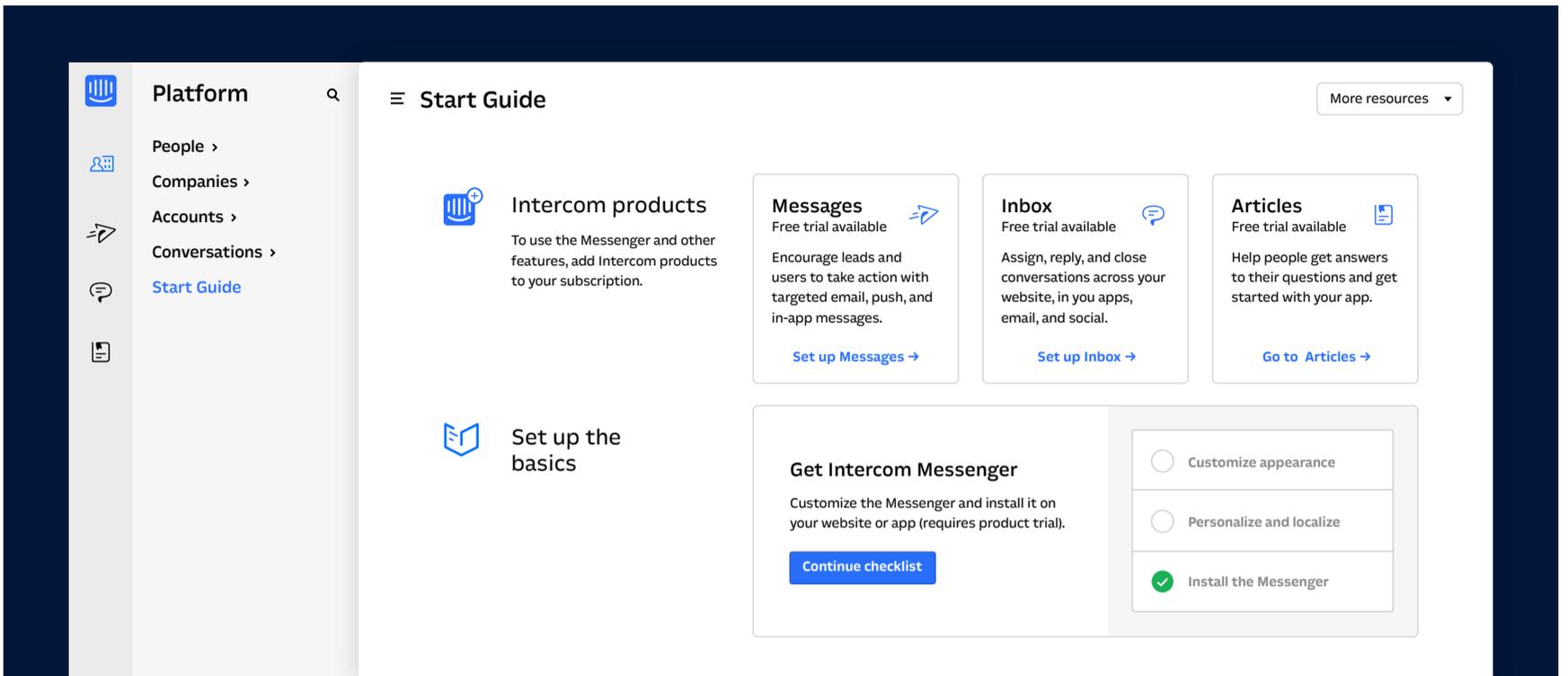
When thinking about onboarding, you can't just consider a customer's first day – you have to think in weeks, months, years, far beyond the first impression. Throughout the whole journey, your customer needs a cohesive experience so they ultimately feel confident in your product, which means it can't be a box-ticking exercise for one team, but rather a constant concern for multiple teams.

However, creating that cohesive onboarding experience when responsibility is distributed across a company is not always easy – especially with cross-functional teams spread across offices and timezones. That conundrum is particularly pronounced when your product meets complex business needs.

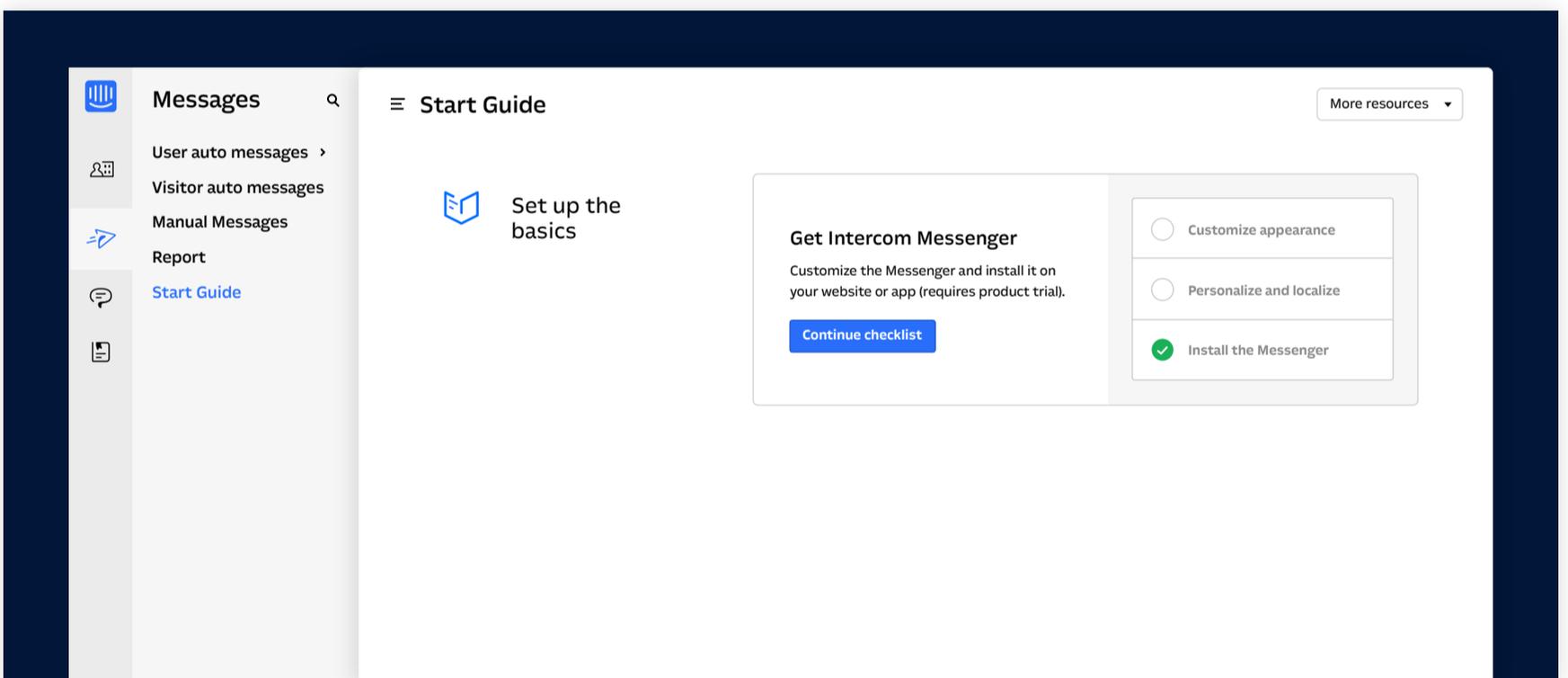
## **In search of consistency**

We discovered this the hard way – with no one team to own a holistic onboarding for all of Intercom, our onboarding experience began to reveal the seams of our organization across different moments in time. Within Intercom itself, a customer's onboarding experience was splintered across various parts of the app.

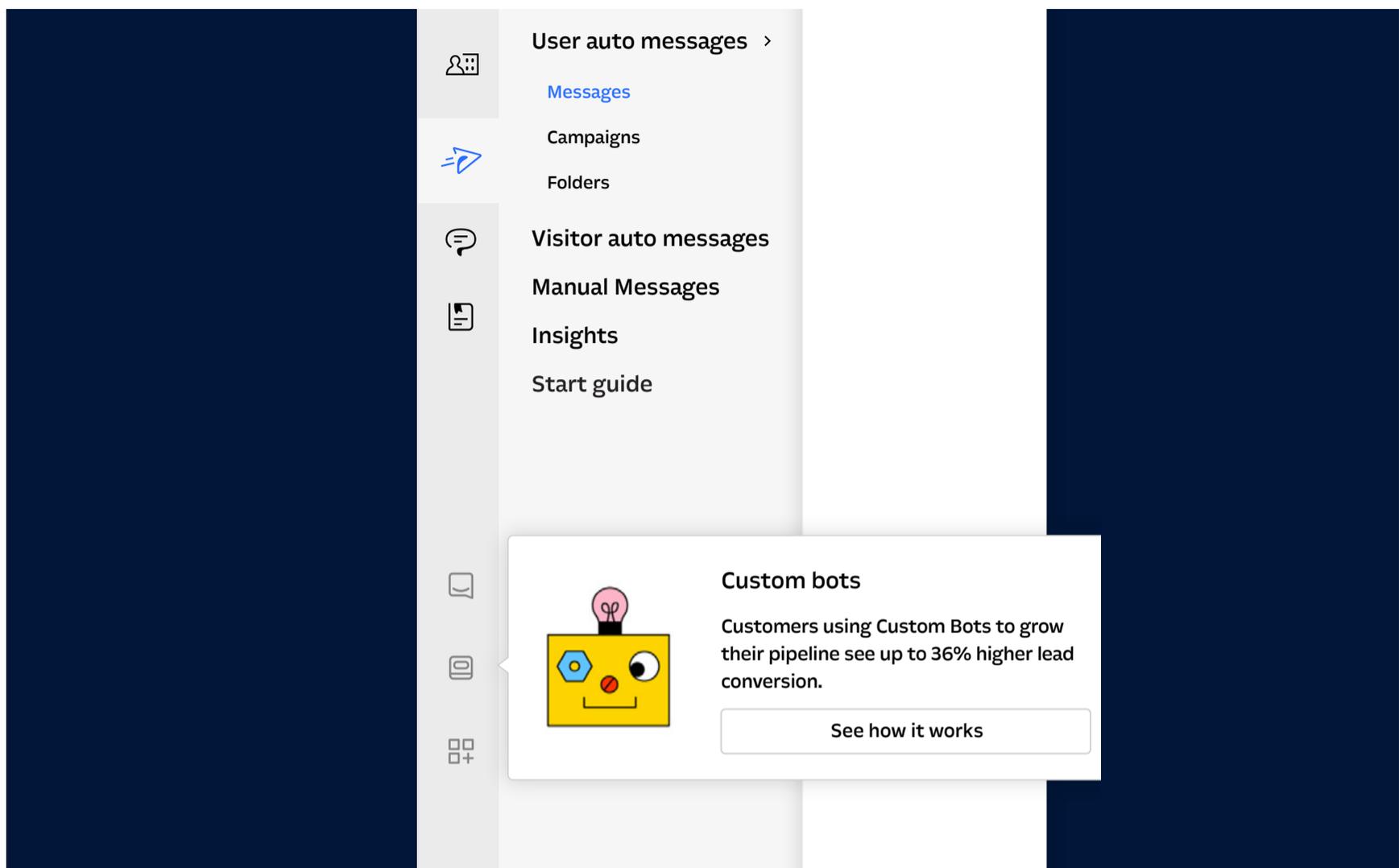
Product teams often found themselves resorting to one-off patterns to support a certain product launch here or there, using inconsistent guiding principles to make onboarding-related product decisions, and using a slightly different tone from our partners in Sales and Customer Engagement, who play key roles throughout a customer's onboarding.



*Onboarding in one part of the app (Platform tab)*



*Onboarding splintered in another part of the app (Messages tab)*



*Example of a one-off pattern to support a specific launch*

How do you empower different product teams and functions – like Sales and Customer Engagement – to input into onboarding, but still come out with a unified, comprehensive onboarding experience that helps customers quickly see value and stay engaged over time?

## **One team to oversee the responsibility**

To answer that question, we made a few big changes, some organizational and some methodological.

We knew we needed to paper over the cracks that had built up over the years, so we did the “obvious” thing and formed a product team – Team Onboarding – dedicated to overseeing Intercom’s end-to-end onboarding experience.

This might seem contradictory. Weren’t we committed to making sure everyone felt a degree of accountability for our onboarding? In fact, while

this approach might seem like we were centralizing and concentrating the responsibility for onboarding on one team and removing it from others, the reality was the opposite.

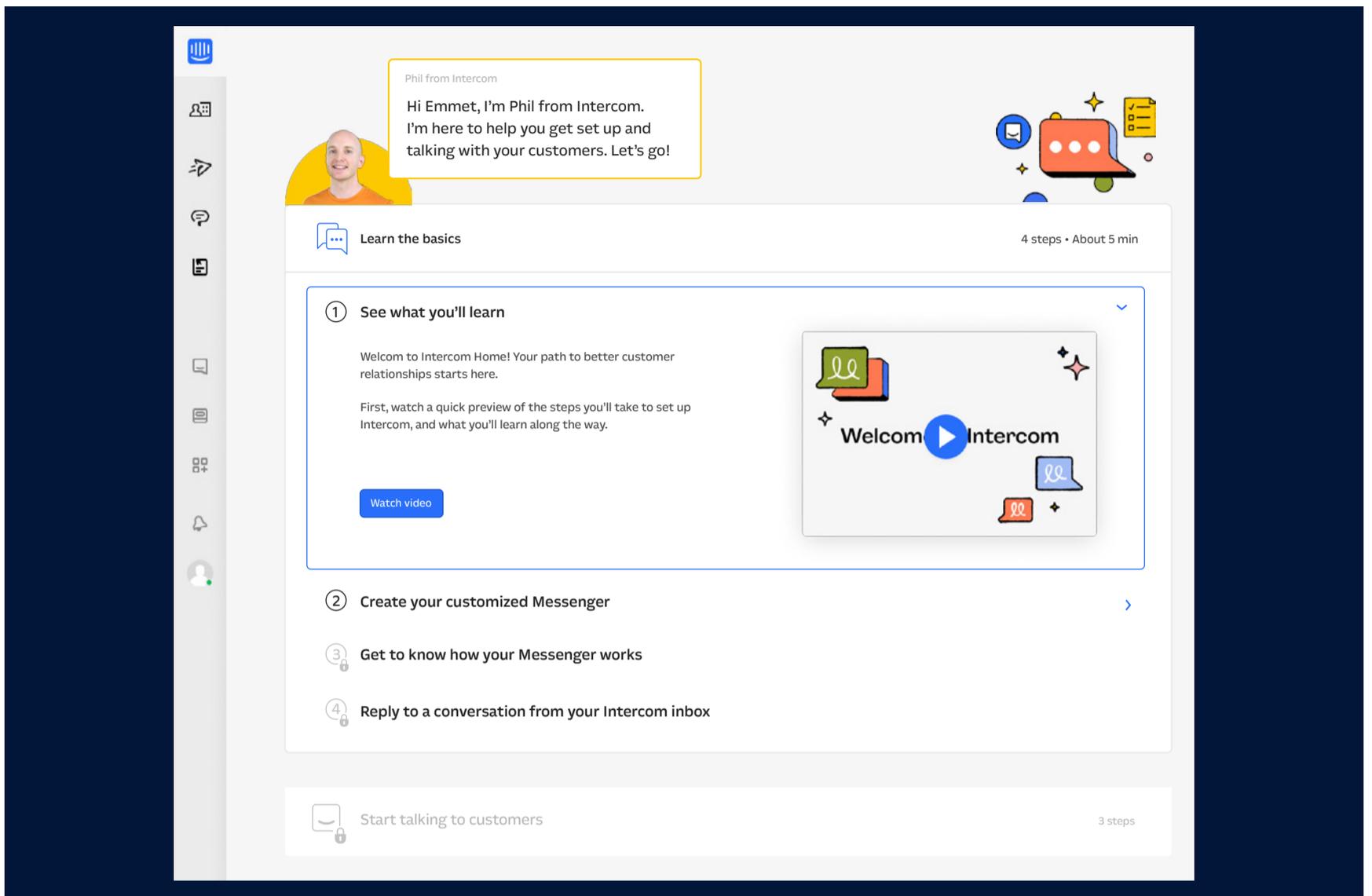
Team Onboarding worked with various teams, like Sales and Marketing, to craft a scalable, long-term onboarding narrative and vision for Intercom. In practice, the team empowered all other product teams to easily contribute and own aspects of the onboarding flow while aligning with an overall strategy and narrative. This way, our customers could benefit from such an onboarding experience that was a shared responsibility across all our product teams.

## **Building a design system for onboarding**

Building a cohesive end-to-end onboarding experience is more than merely an organizational issue, however. We needed to entirely rethink how we presented our onboarding, and consider not just our present needs but also how they might change.

We devised two key components to deliver on that vision.

1. **A modular onboarding framework** – a set of discrete objects and principles to allow other product teams to easily create onboarding content for different use cases or features, and to swap in or out this content over time to adapt to user needs and business changes. This modularity is crucial in a powerful product like Intercom, where use cases can vary widely and evolve quickly.
2. **A new “Onboarding Home” experience** – a focused set of activities designed to onboard new Intercom customers without overwhelming them. Onboarding Home is designed to be the single place for all new customers to start setting up Intercom – it’s where new customers land in the app for the first time. We treated it as a product in its own right, and based it on the modular framework we set out above.



*Onboarding Home provides a single place for all customers to start using Intercom*

## A framework for discovery

The modular onboarding framework we devised was inspired by video game tutorials and skill trees, which start simple, build on themselves, and incrementally expose gamers to the complexity of the video game.

### Helping users level up

To that end, we crafted a seemingly simple but powerfully flexible framework, made up of a series of levels which contain discrete steps. We wanted the levels and steps in our onboarding framework to start with the basics, and then gradually and progressively guide our customers towards becoming confident power users of Intercom.

Each level in the framework has a clear objective and success metric, and includes a sequence of steps to:

1. Introduce customers to a concept and the value it brings to their business.
2. Encourage users to do the simplest thing possible to learn how the concept works with minimal effort.
3. Know where to go within the product to learn more about the concept.

After completing a level, customers should feel like they understand what the concept is, why it's important and where to go in the future to do more.

Each step within a level follows certain design patterns, depending on the goal of the step and when a customer might encounter the step within their Intercom journey (i.e. have they just signed up, or is this their 10th time signing into Intercom?).

In creating unified patterns to best help customers learn these concepts, we leveraged education principles like “scaffolding” and “learning by doing” to focus a customer’s initial learning within the environment of Onboarding Home. These are techniques to fast-track understanding without overwhelming users, before gradually guiding them to complete steps contextually in various parts of the product, after they’ve gained more confidence.

## Level template

Level title	Verb your object with/to feature/product/goal	X steps · About Y min
Step 1	① Introduce the concept and the value it provides	>
Step 2	② See how the concept works in context	>
Step 3	③ Start using the concept in a simple way	>
Step 4	④ Learn more about ways to use this concept	>

*Template showing a level and the types of steps within it*

These levels are grouped and ordered by increasing complexity and specificity of customer needs: starting with the most basic bare bones fundamentals of Intercom, to the necessary setup required for a certain use case, to more specific concepts like optimizing or automating workflows.

Every product serves different users with different needs, so if you were to adopt a similar framework, you'll have to put a lot of thought and attention into grouping and ordering the levels to best reveal the value in your own product.

### **Creating a familiar experience for users**

To make the environment approachable and familiar for a new user, especially in the first few moments when they're interacting with our product, we worked closely with our partners outside of the product team.

That's because we knew our in-product onboarding flow had to be strongly connected with the sales and marketing narrative to reinforce the value that customers signed up for. This allowed us to create a cohesive end-to-end customer experience that was still adaptable enough for a wide variety of use cases.

## A cohesive set of guidelines and principles

Establishing these guiding principles was key to ensuring the modularity and extensibility of the onboarding framework. Based on these guidelines, other teams can now easily create onboarding content for their use case or feature while still ensuring a cohesive end-to-end customer journey that ties back to a single strategy and overall onboarding narrative.

Thinking about the elements of onboarding in terms of a design system means considering how it will work in the long term. From the start, you'll want to future proof your framework and make sure other product teams can easily use it. For instance, while we were designing the specific levels and steps that would go into our Onboarding Home release, we also used the framework to design reusable components, guidelines and design principles.

Drawing on learnings from having a centralized Design Systems team, we put together guiding resources to enable other teams to build on top of our onboarding system. This includes a checklist of when to add features to Onboarding Home, a set of onboarding patterns and guidelines to follow when doing so, templates for creating levels and steps and examples of do's and don'ts.

### Step 1 template

Introduce concept and value

**This step should**  
Give teammates an understanding of how the concept could help them with a goal

**Patterns to use**

**Video**

① See what you'll learn

Welcom to Intercom Home! Your path to better customer relationships starts here.

First, watch a quick preview of the steps you'll take to set up Intercom, and what you'll learn along the way.

Watch video



Step 1 template

These are living breathing tools that link directly to components in our codebases and design tools, so PMs, designers and engineers across the company can plug and play into a cohesive onboarding experience as easily as possible.

## **Better alignment = better onboarding**

When considering how to devise and implement a holistic design system for your own onboarding experience, it's vital to take a step back and recognize any gaps or inconsistencies that exist. Consider not just how to fix those gaps and inconsistencies, but also why they might have arisen and how you can ensure they don't creep back in. Invest the time to establish a scalable, long-term onboarding strategy and modular, adaptable framework. After all, if you're serious about making sure that every team is responsible for the success of your onboarding, you have to give them the tools to do it right.





**CHAPTER 10**

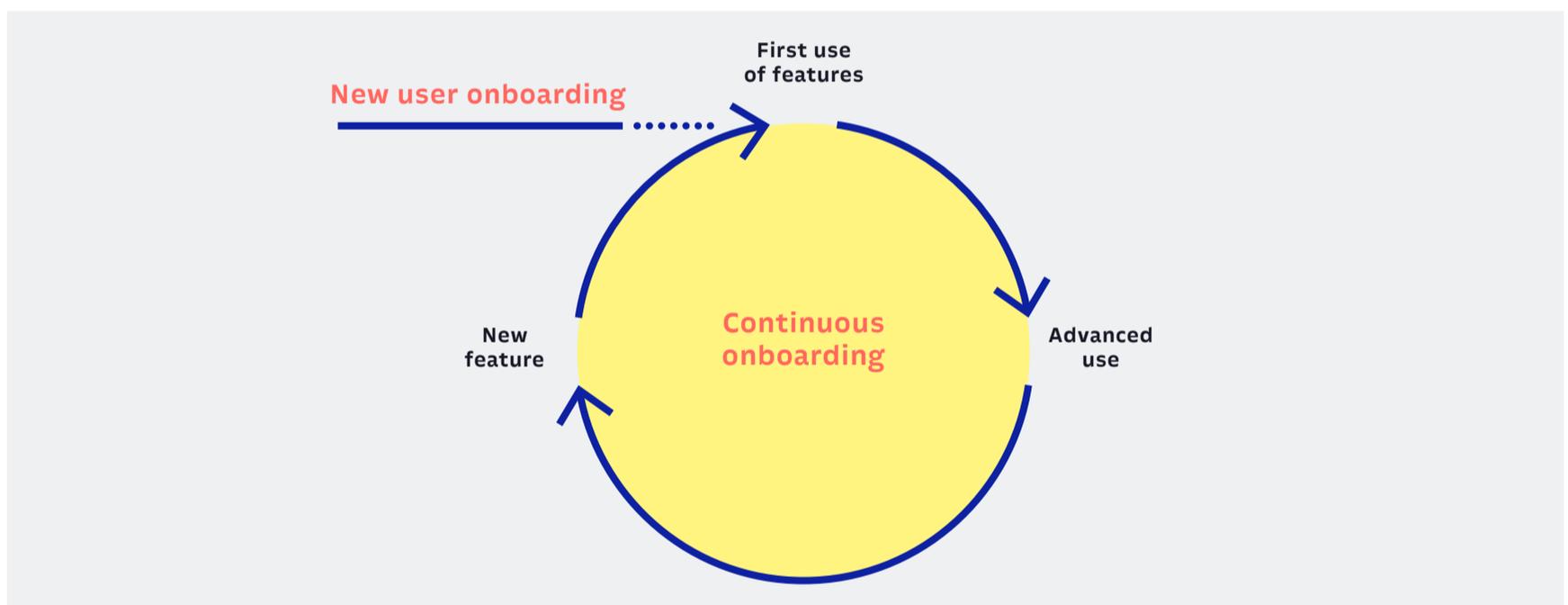
# Onboarding never stops

*Ruairí Galavan*



You might intuitively think onboarding is just about the period immediately after a new user signs up to try your product. In reality, their onboarding experience is just getting started. That's because you haven't turned those new users into experts, and they haven't yet given up all the other products they used before yours.

Good onboarding isn't just about getting your new signups started using your product. It's a continual process of guiding people toward the success they desire. A continuous onboarding campaign is the quickest and easiest way to achieve that. Timely, relevant messages will remind users why they're here, show them what they can accomplish and guide them to what they can do next.



If you continuously educate and help your users throughout their lifecycle, they will reap the rewards for years to come, which means they will be more likely to stick around and become long-term, loyal customers.

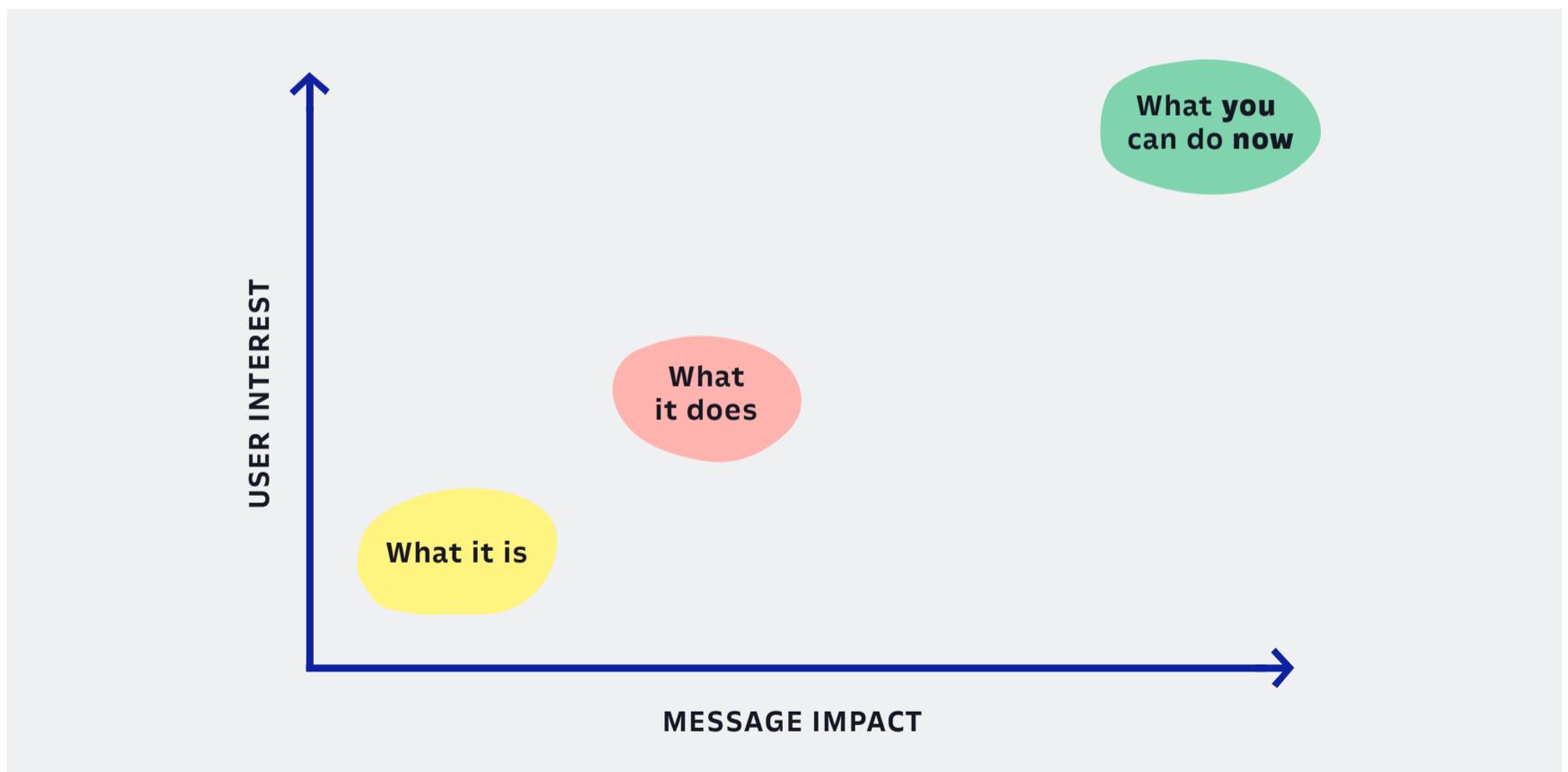
The key to an effective continuous onboarding campaign is to make just enough information available at every turn but also to stay out of the way, so customers can get on with using your product. Here are a few powerful ways to do that.

## Gradually expose features over time

Think about a video game like Super Mario Bros. At any given point, only Mario's immediate surroundings are on screen, allowing players to gradually and naturally understand what's going on around them. As you make progress, only the next piece of relevant information is exposed. Imagine you saw the entire level as soon as you started playing? Front loading your users with information will make it harder for them to get past the first few hurdles.

For example, Intercom users don't need to know about our keyboard shortcuts until they've been in the Inbox for a while and have started to deal with a heavy load of user conversations. It's certainly not a day one announcement. Similarly, they probably don't care about our bulk data export feature until they've collected enough information about their own leads and customers.

The best time to tell a customer how to do this stuff is after you've gathered evidence that they're a good candidate to hear about it.



## **Anticipate the next questions for engaged users**

In education, the more you hold someone's hand, the less their brain will engage. The same goes for onboarding – if you keep spoon-feeding solutions to users, don't be surprised when they can't pick up a knife and fork. That's why it's better to give information as gradual hints, so new users can more deeply retain what they've learned.

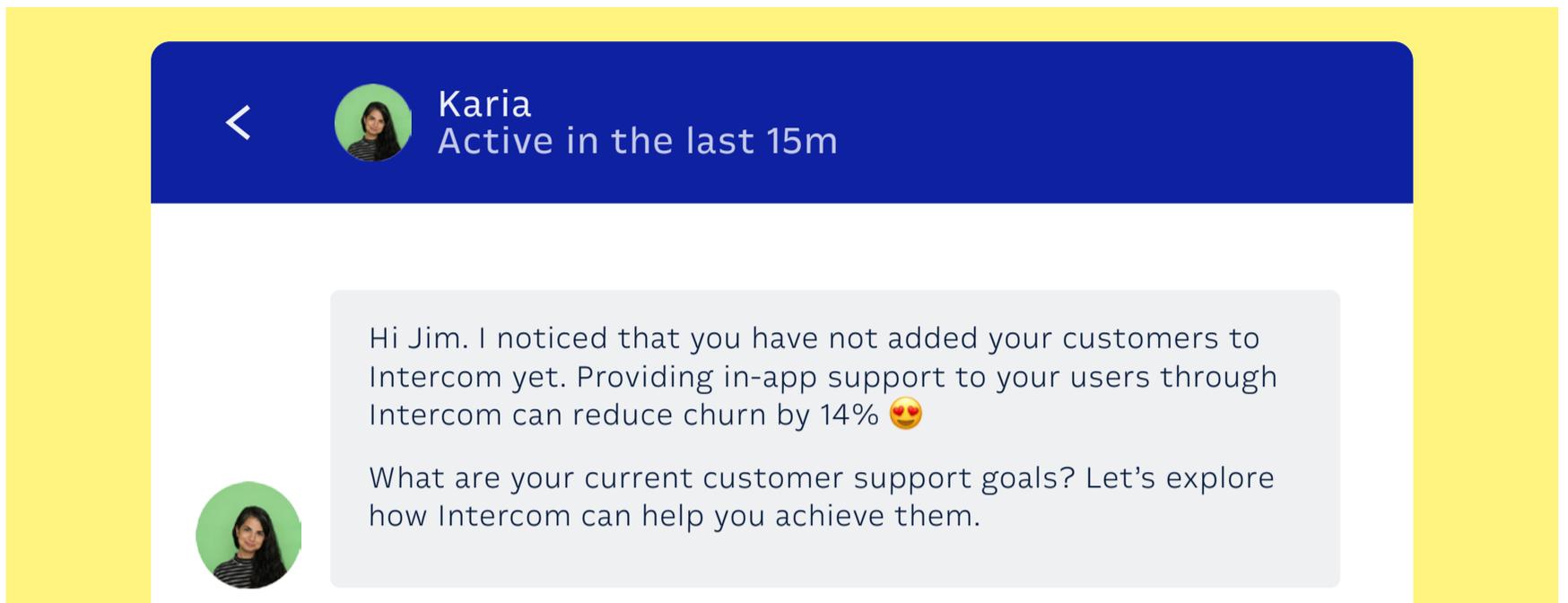
One of the best ways to do this is to center information around the intent of the customer. For example, in Intercom, when a customer creates a new message, they've shown intent by clicking on the “New message” button. With new users interested, now is a good time to start sharing more advanced information. For example, we could trigger a Product Tour to show them how to complete the steps required to send their first message. This type of careful consideration really drives engagement.

## **Give reluctant users a helping hand**

For every passionate user who will do everything they can to upskill on your product, you're going to have those who are a little more reluctant. In educational theory they're referred to as “grazers.” Unlike “hunters,” they rely on being “fed” information to upskill on a specific topic – in this case, your product.

When a user signs up to your product, it's important to make sure they're performing high-value activities in your product as soon as possible. These “successful moments” will differ for every company – for Intercom it's things like getting users to create a message. You'll need to define what a successful customer looks like in your product and then work backward to figure out the steps your customer needs to take to get there.

It's unlikely that "grazers" will take the first few important steps in your product unaided, so it's a good idea to set up a series of useful prompts.



## Help your users form useful habits

The onboarding flows of Facebook, Twitter, Google and Slack all have one thing in common – they create habits among their users. So how do you create these habits in your own product?

Obviously, there is no shortage of ways to help users form habits, and your approach will depend on your product and the use case it caters to. For example, if your product has a browser extension, desktop application or mobile app, promote it via an email or live chat message and make sure it's easy to add.

By getting new users to integrate your product across multiple platforms, you're increasing the likelihood your product will become a regular part of their lives. We see this approach used by Dropbox, for instance – new Dropbox users who fail to install the mobile app won't experience the full value of being able to access files anywhere. They may upload fewer files, use less space and may be less likely to pay for more storage.

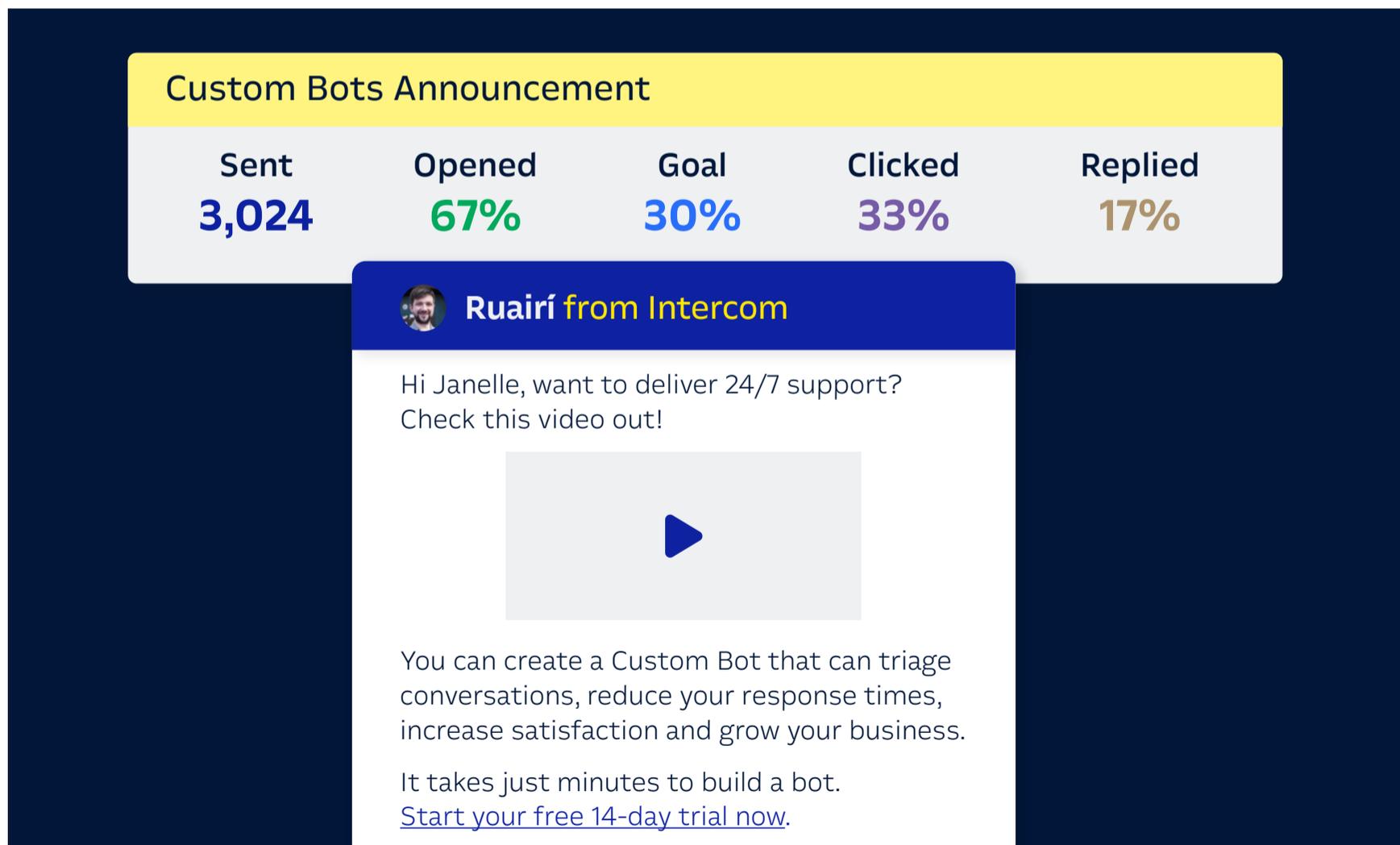
The key here is to highlight the benefits of adopting new habits and the costs of failing to do so. Either way, you need to give a compelling reason why users should change their mode of working.

# Educate your users about new possibilities

You wouldn't welcome new users to your product by asking them to do complex tasks only a pro user would be able to do, and in a similar vein, don't overload existing users when you're onboarding them to a new feature.

When we launched Custom Bots, we knew it had the potential to improve a lot of our customers' businesses by netting more high-quality leads around the clock. This gave us a significant opportunity to deliver more value to our existing customers with proper onboarding.

The challenge was that many of our customers were new to chatbots, and we realized they would need our assistance learning how to implement chatbots for the first time. The easy path would have been to send a one-off announcement email to all our customers. Instead, we set out to consciously onboard existing users to Custom Bots by making just enough information available at every turn, right when the user needed it.



We announced the new feature to customers when they arrived in the Custom Bots area of Intercom via an in-app announcement. That message contained a video with a high-level overview of the feature and instructions to get started. Like all good onboarding messaging, it's closely modeled on just-in-time information – teaching at the exact moment when specific information is actually useful.

## **Reactivate dormant users**

Don't take inactivity as a sign that people have lost interest forever. In this always connected world, there are plenty of distractions that can pull people away from making the most of your product, especially if habits weren't firmly established to begin with.

To reactivate dormant users, you can offer one-time deals down the road or wait for a big product or company announcement to try to re-engage people. Even if you're months away from the next big feature release or don't have anything new to show off, there's still valuable material you can offer dormant users, whether that's educational content such as books or the opportunity to take a paid survey.

## **Successful onboarding is a continuous process**

When you're onboarding users to your product, remember there are hundreds of companies competing to help customers achieve the same outcome. If you're not continuously showing your customers how to get value out of your product, you're not encouraging product dependency. You're leaving the door open for someone else to come in and persuade them their product is more valuable than yours.

That's why you need to continuously onboard new and existing customers, bringing people through to sustained success and making sure they get as much value as they can.





# Customer retention is the new conversion

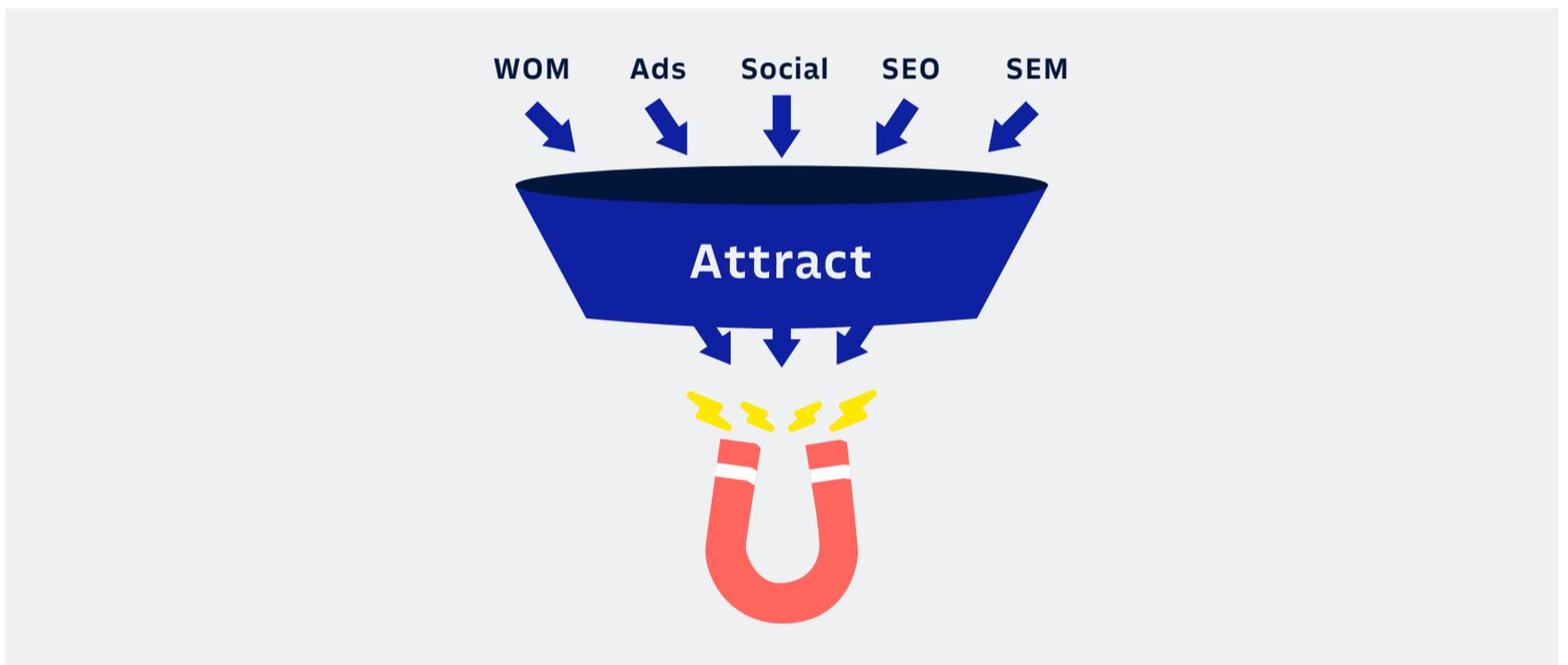
*Des Traynor*



For anyone starting a company, new customer acquisition and conversion is an obsession. The traditional customer acquisition funnel is focused on getting people to hear about your product and bringing them to the point of becoming users or paying customers.

Back when my Intercom co-founders and I were trying to grow our first company, Exceptional, all we ever stressed about was getting more customers into the funnel and converting them to users. If we did enough of that, we'd get rich, right?

Through a constant series of failures and disappointments, we realized there is no one magic way to get more customers into the funnel. There are actually a lot of ways and cumulatively they all matter.



At Exceptional, however, we quickly realized that the traditional acquisition funnel leaked users. We worked hard to get people to visit our website and sign up, but it became clear that all of our hard work was wasted if they didn't stick around.

We went from wondering “How can we get people to hear about us?” to “How can we get prospects to sign up when they land on our page?” to “How can we get customers to stick around?”

What we quickly realized is that there are two funnels for SaaS businesses today. If the first funnel is all about attracting new users, the second funnel is

all about keeping them. Remember, you can growth-hack the hell out of the first funnel, but if you want to build a truly great business, you need to solve the second one.

We're seeing this play out all the time. To give you a simple example, would you rather have a million signups in four days, or a million active users after 16 months? This isn't an entirely hypothetical question – the first business is Yo, and the second business is Slack. If you're wondering why Yo isn't around anymore it's because they solved the first funnel, but not the second funnel.

We learned this early – you can have a high-functioning first funnel creating awareness and curiosity, but if people get to your homepage and it's poorly designed, then you'll fail. If they actually sign up but your onboarding is no good, then you'll fail. Even if you have good onboarding but they don't keep finding sustained value in your product, then you'll ultimately fail. You have to work very, very hard on every stage of your second funnel to build a really successful business, which will result in high customer retention. And that is the key to long-term success.

As [Benedict Evans](#) quipped in a tweet: “A cool new messaging app getting to 1m users is the new normal. Keeping them, and getting to 100m, is the question.”

## **High retention is built on great onboarding**

Moving your focus from the first funnel to the second funnel means changing your priorities – the most urgent question becomes, “How do we get customers from signed up to success?”

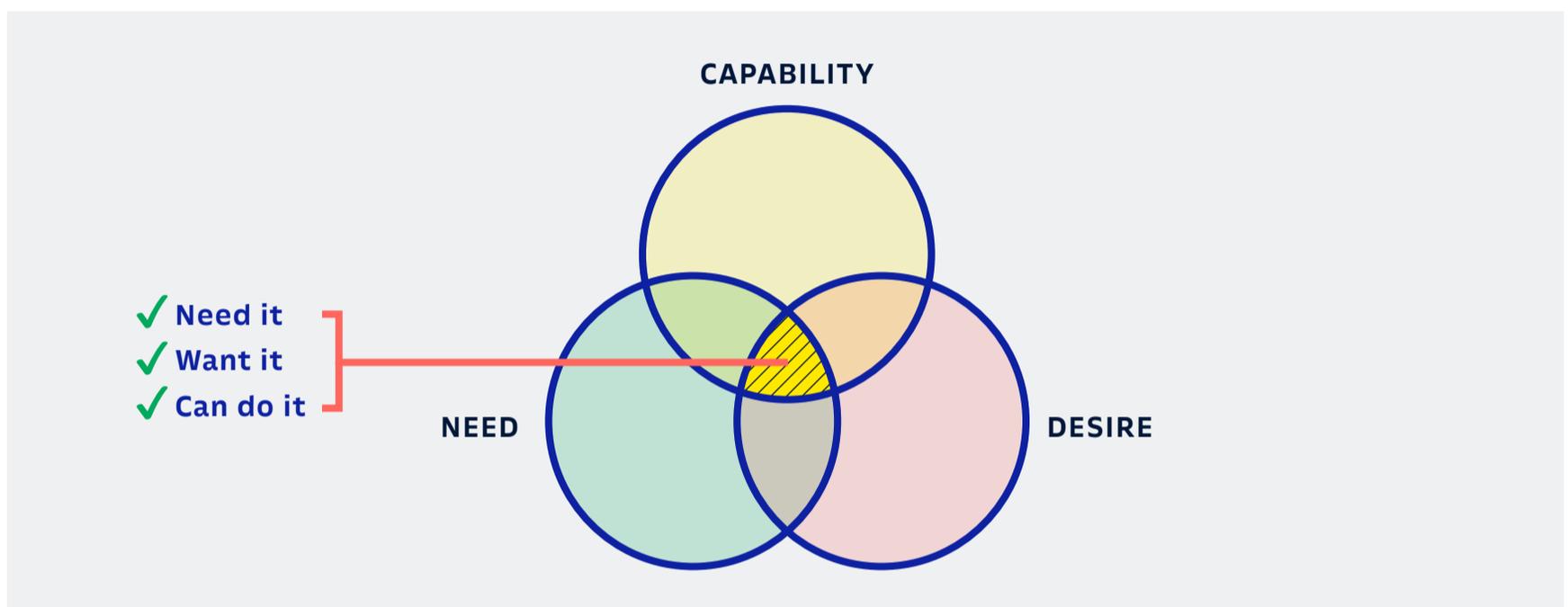
In this sense, customer retention is the new conversion. And to get retention right, you need to have great onboarding. Successful onboarding is the challenge of getting people from thinking, “What the hell is this product?” all the way to, “My god, this is a great product.”

You have to work very, very hard to first onboard your customers and then to get them to stick around. Here are a few core concepts you'll need to keep in mind in order to get it right.

## Your customers' three key criteria

Firstly, it's important to realize that you can't onboard everyone. It's a mistake to try because you'll end up attempting to bend your product around the needs of very disparate users.

You can only onboard people who have a need, a desire and a capability. No two of these three are enough.



If a customer needs your product and desires it, but they don't have the authorization to purchase it, then you won't be able to bring them on board. Similarly, if they want it and are capable of buying or using it but they don't need it, it's not going to work. That's like me considering buying a Tesla. I really want it and I'm capable of buying it (second hand), but I can't justify it right now as there's no real need.

Lastly, if you need it and you're capable of doing it but you don't want it, it's a difficult onboarding. That's like me going for a tooth extraction. Yes, I may need it. Yes, I'm capable of booking one, but no, I certainly don't desire it.

## Your definition of customer success should shift with your product

Something I always tell startups is that if you're doing things right, you're going to ship a lot. And if you're doing things really right, you're going to

ship all the damn time, which means your product is constantly in flux. It's nothing short of a moving target.

Every time your product changes, your definition of success for a customer has to change too. And every time you write anything substantial about your product, like your start guide, you need to reconsider what a successful user looks like. What are the things you want them to do, in what order, and how?

Those changing expectations have to be reflected in your onboarding, which needs to bring users to those moments of success. As your product and service offering evolves and changes over time, you'll invest money and time in new features, big product launches and expensive release cycles. But if you don't constantly update your onboarding experience to match, those "new improvements" will sit unappreciated and unused. You need to fight for usage, by onboarding both new and current users to your new features.

It's a common mistake for companies to launch features in products without any context. Your goal should never be "just get it launched" your goal is "get it used." That's why the right time to promote an improvement is not only when someone is in your product, but when they're in a position to use it.

## **Regularly put yourself in your customers' shoes**

What is one thing that every single one of your customers does? Answer: Sign up for your product.

Most product owners sign up for their product just once. If you don't continuously reimagine what it's like to land on and start using your product, the experience goes out of date. Your product tour is out of date, your help docs are out of date, your welcome email is out of date.

A neglected onboarding is net negative over time. You're pointing people to yesterday's ideas of your product, not today's, which means you're pitching them on the wrong things when they decide to use your product. Meanwhile, your users are never going to bump into the valuable new features your product team have built.

Never stop signing up for your own product. It should be someone's job to experience your onboarding every week and make sure that everything still works well and makes sense.

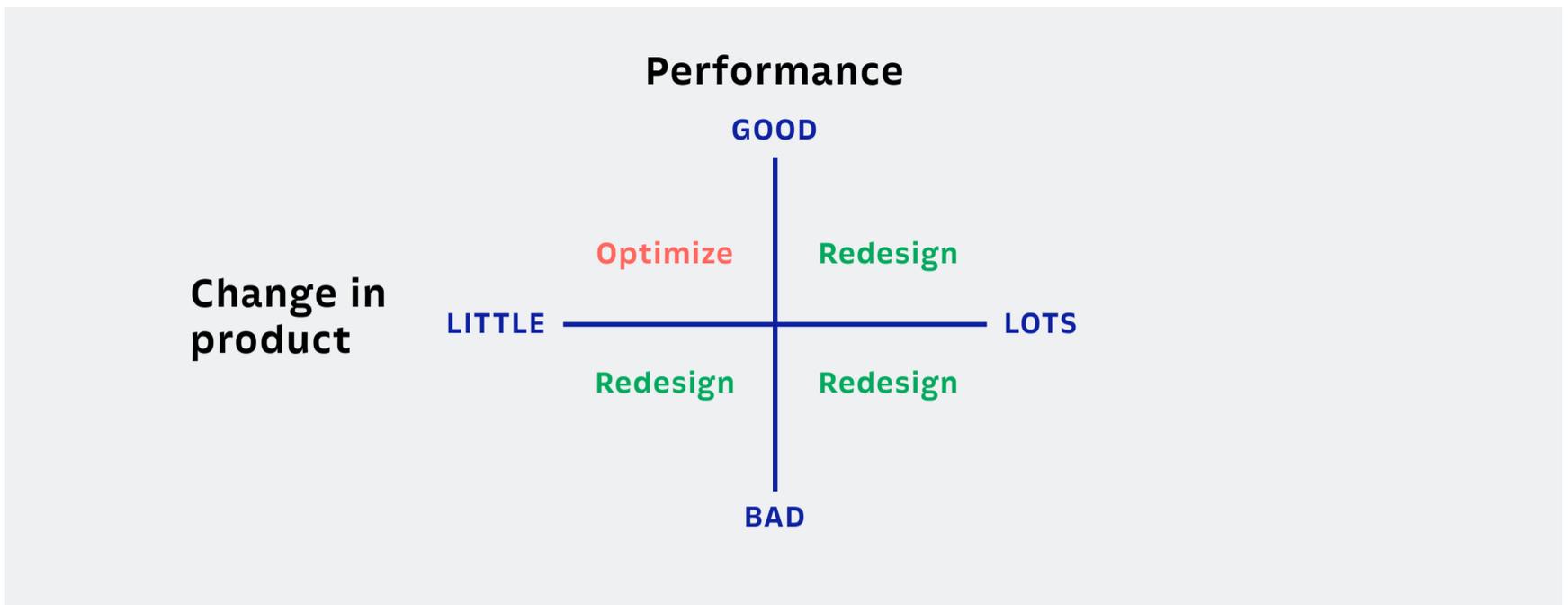
## **Know when to optimize and when to redesign**

Modern onboarding requires you to understand your users' definition of success and break down the barriers to get them there. Small tweaks in your onboarding won't help your users become who they want to be. This is why you can't always optimize your way to better onboarding. Optimization can very quickly become a black hole where you sink all your team's time and get very little in return. Sometimes, you need to rethink your onboarding from the ground up to get users to their desired state.

You need to know when to reset:

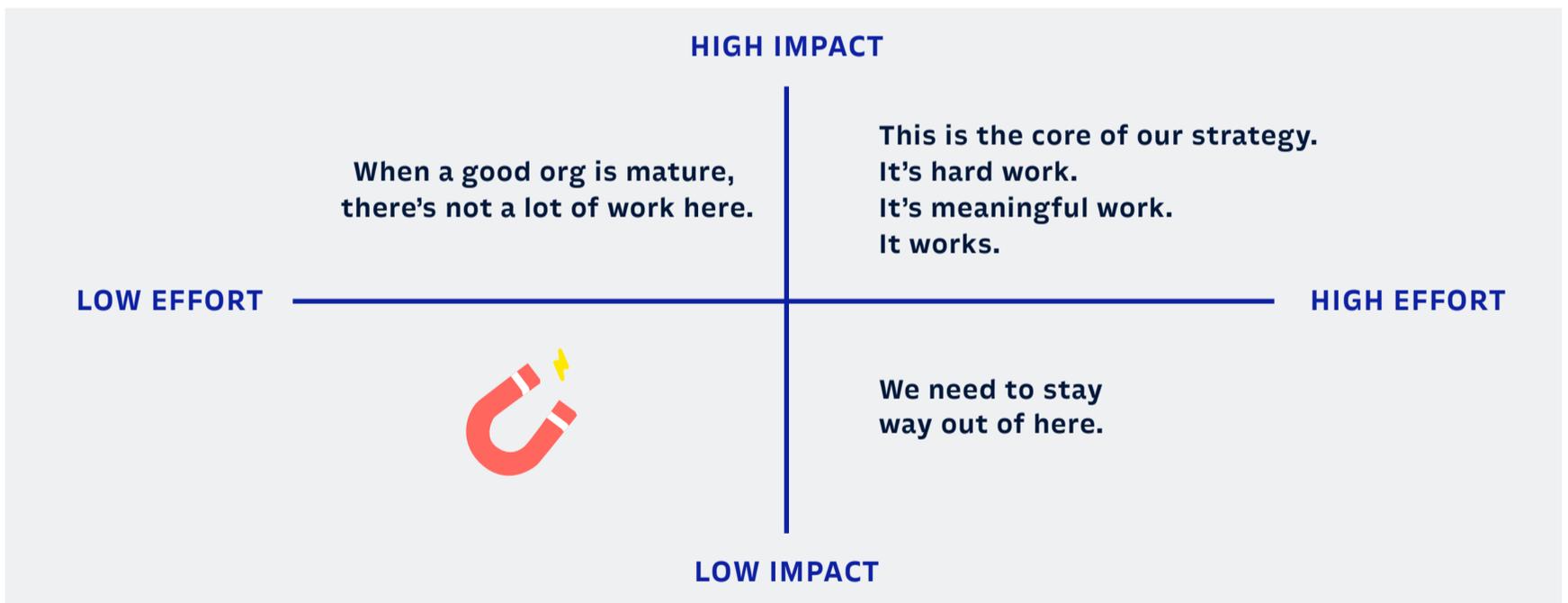
- If your product doesn't change a lot and your onboarding is good, that's a great time for optimization.
- If your product has changed a lot and your onboarding doesn't work, that's a great time for redesigning the whole thing.
- If things have changed a lot and your onboarding is working, you should go back and reimagine it anyway.
- And if your onboarding isn't working, you should fix it.

As you can see, there's only one great case for optimization. That's when you're doing the right thing and you just need to make it better.



## Focus relentlessly on high impact work

The work your growth team or your onboarding team does can be high impact or low impact. It can either be a lot of work or a little work.



Take a look at the four quadrants above – it's something that applies to prioritization in general, but should also be a significant consideration as you craft your onboarding strategy. Most people are good at staying out of the lower right, which is obviously a lot of work and achieves nothing. The top left tends to see quick wins, but there's very few of those. The top right represents your strategy.

The hardest thing you'll ever do is get your team to stay out of the lower left. That work is easy but does nothing. When it does nothing, you say,

“But it was easy.” And because it’s easy you say, “Well, we don’t expect it’ll do much.” You have this circular logic where you spin your wheels and you produce nothing. Only focus on high-impact work in onboarding, because there are so few occasions when it makes sense to tweak.

## **Customer retention is the next frontier**

Great businesses are built on high customer retention. It’s not about everyone hearing about your product, it’s about everyone who does hear about your product using it successfully.

High customer retention, in turn, is built on a great onboarding experience. Understand your customers’ goals – do they need your product, do they want it, and are they capable of progressing?

Your onboarding must improve as your product improves, so constantly revisit your onboarding. And remember, focus on the second funnel – customer retention is the next frontier, so make it your priority.





# Conclusion

The number one mistake every business makes with onboarding is thinking from the inside out. Instead of starting with the outcomes a customer wants, they start with a model of a profitable customer and try to reverse engineer what needs to happen to get them there.

Over the lifetime of Intercom, we've discovered the only proper way to onboard people is to understand where they are, what capabilities they have, where they want to get to, and then use a combination of interface, communication, tooltips, nudges and messages to ensure they're never stuck on the path to achieving their outcome. That's what successful onboarding looks like – unifying a successful business outcome and a successful customer one.

I hope this book has shown that onboarding is everyone's job and getting users set up is only one piece of the puzzle. If marketing can't describe the outcome customers are looking for, if product can't build a signup process people understand, if customer education can't help get to those successful outcomes, onboarding breaks down. So many forces feed into onboarding, so don't trick yourself into optimizing one small sliver of your onboarding and ignoring the others.

When you think about it, it doesn't matter how good your product is – without onboarding it's meaningless. Onboarding is the bridge between the user's stage of desire for value and the value they actually get – that's what makes software successful.

Thanks for reading.

*Des Traynor, Co-Founder, Intercom*



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