User Onboarding

User onboarding is the process that new customers go through to start using your product effectively. A smooth, comprehensive onboarding experience is directly linked to **higher product adoption and retention.** In fact, **63% of customers say that the onboarding program is a key consideration in their decision to subscribe or renew**.

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Poor onboarding is one of the top reasons users churn, after lack of product fit and lack of engagement.

Let's examine some of the key onboarding practices.

- **Welcome Experiences**: greet them with a welcome message or tutorial

As soon as a user becomes a customer, greet them with a **welcome message or tutorial**. Many SaaS products trigger an in-app welcome tour: a series of tooltips or modals highlighting key interface elements. This is often referred to as **product walkthroughs**. As I mentioned, companies also send a **welcome email series** specifically for new paying customers, which might differ from trial nurture.

- **Interactive Tutorials & Checklists**: *"Create your first template"* or *"Invite a teammate"*

Next, interactive tutorials and checklists are quite common now. They provide a sequence of important actions for the user to complete. For example, an application upon sign-up presents an interactive tutorial page with examples of what you can do, and an initial task list like "Create your first template" or "Invite a teammate" to encourage trying features immediately. This guided "to-do list" style onboarding is effective because it gamifies the learning – the user checks off tasks and reaches 100% setup.

According to Userpilot's stats, many companies find success using such interactive walkthroughs. **47% of companies offer interactive walkthroughs and 38% use product**

tours to guide users.

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- **Educational Content**: getting started guides, academies, training modules

Great onboarding extends beyond the user interface. You can provide easily accessible **learning resources.** This can be a **getting started guide** written or as a video that walks through initial setup.
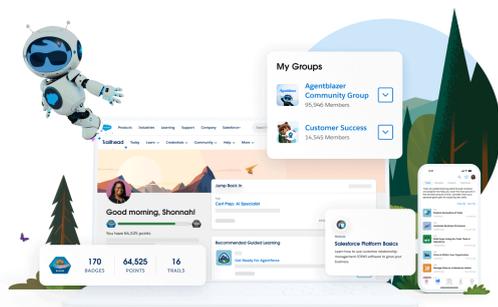
Many SaaS companies create a **"Academy" or training module** – for example, Salesforce has Trailhead, HubSpot has HubSpot Academy. Users can take courses and earn badges while learning the product.

Given that **over 86% of customers say they'd stay loyal to a business that provides educational onboarding content**, investing in creating this content and in guidance is an investment in retention. Not every company needs a full academy, even a series of short tutorial videos can really help new users.

- **Proactive Customer Support Outreach**: *"Hi there! Need any help getting started?"*

In early onboarding, proactive support can prevent a lot of frustration. This might be a personal email or an in-app chat message saying "Hi there! Need any help getting started?".

If usage data shows a customer hasn't completed key actions in the first few days, a support rep might reach out personally offering a one-on-one onboarding call. Many B2B SaaS companies assign dedicated Customer Success Managers for larger accounts to do **kickoff calls or training sessions** with the client's team. The idea is to catch users before they give up.

Since we know **75% of users who don't understand a product will abandon it within a week**, catching them on day 2 or 3 with help can literally save that account.
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- **Contextual In-App Guidance**: tooltips, hotspots, or resource centers

Modern SaaS often have **tooltips**, **hotspots**, or **resource centers** built in. A **resource center** might be a little help widget that when clicked, offers FAQs, a link to documentation, or suggests next steps.

Onboarding tooltips might appear contextually. For example, the first time a user goes to a certain feature, a tooltip says "Here's how this feature works." This just-in-time training prevents users from feeling lost. The key is to not overload all info at once but to gradually reveal tips as they explore.

- **Welcome Survey (Personalization)**:
  - to segment and route the user into a relevant onboarding path
  - to make the user articulate their success criteria, which psychologically sets an expectation

And finally, some companies, at sign-up or first-login, ask a few questions about the user's goals or use case. This can serve two purposes:

(1) Firstly, **to segment and route the user into a relevant onboarding path**. For instance, if a user says their main goal in a CRM is "Pipeline management", the app might highlight pipeline features first.

(2) Secondly, **to make the user articulate their success criteria, which psychologically sets an expectation that you will help meet it**. For example, a productivity software asks what kind of team you're on and what you plan to manage with the software. Then it loads a tailored default workspace with sample projects relevant to that choice. This reduces the effort needed for the user to imagine how to use the product. It's pre-configured in a way that resonates with their needs.

There are several **metrics** that SaaS companies use to measure onboarding success.

a)   *Time to First Value*: the time it takes for a user to complete a key activation step

b)   *The percentage of users who complete onboarding steps*

c)   *Short-term retention*: a first-month retention rate of 30–50% is typically seen as healthy

d)   *User feedback:* Net Promoter Score or Satisfaction surveys

One of the most important is **Time to First Value.** It is **the time it takes for a user to complete a key activation step that demonstrates the product's value.** A shorter time generally signals a smoother onboarding experience.

Another important metric is the **percentage of users who complete onboarding steps**. For instance, if **80%** of users connect their data source within the first 7 days, it indicates a strong onboarding process. However, if only **30%** manage to do so, it may signal friction or confusion in the early experience.

Short-term retention is also a valuable indicator. Retention after one week or one month shows whether users are finding enough value to return. A first-month retention rate of **30–50% i**s typically seen as healthy. If retention falls below that range, it could suggest that either the onboarding experience or the product's value proposition is not resonating early on.

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Lastly, **user feedback** provides direct insights into the onboarding experience. Tools like Net Promoter Score or satisfaction surveys can be used, often after 1 month, to capture early sentiment. These responses help determine whether users felt supported and confident using the product during their initial weeks.

The bottom line is effective onboarding delights by removing friction and making the user feel smart and capable with your tool. Empowered user is a happy, sticking user.