10 Secrets of Effective Onboarding
1. Set Expectations

By showing your users exactly where they are in the process and how much they have left to go, you make it easier to get started, and via the endowed progress effect, make them more motivated to finish with every step that they take.

2. Break Things Down

To avoid onboarding overwhelm, make every step in the process as small and simple as possible.

3. Do You Really Need All of That Info Right Now?

Every piece of information that you ask for is another step for the customer to complete, and every step is a potential abandonment point. If it doesn’t deliver value to you or them, think about not asking for it.

4. Call Attention to Important Elements

You know what’s easier than telling a customer to “Click on ‘Direct Messages’ in the sidebar to send a direct message?” Showing them exactly where to do that. Overlaying onboarding instructions directly into your app or website used to require the help of a developer, but tools like AppCues and Nickelled, among others, make this easy for anyone to do today.

5. Leave Something to Discover

Don’t worry about secondary features or non-core integrations in the onboarding process. Leave the user something great to discover about your business later on. For now, focus on getting them engaged enough to want to learn about those extra features.
6. Show Off the Product

If you have functionality in your product that you can use to both show and tell, doing so can be a great way to explain and reinforce the value of your product at the same time.

7. Videos Can Help

People learn in different ways and by incorporating great video into your onboarding flow, you’re able to better serve a wider audience.

8. Make It Skippable

Make a “skip” button easy to find and click so those who don’t want or need to go through your onboarding flow don’t have to.

9. Build the Relationship

You might have your own idea of customer success, but customers never think in those terms. The best way to understand customer-defined success is simple: ask the customer.

Getting insight like that will help you improve your onboarding process, today and over the long term as your user’s needs change.

10. It’s Not Just About Product

Onboarding isn’t just about your product or service. It’s about the entire experience of doing business with you. Including your customer service.

You might deliver the best customer service in the world, but if your customer never has the chance to find out, how will they know?

Companies that focus on great support can create tremendous goodwill with new customers by reaching out with proactive customer service from day one.
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