

# Stateful Onboarding

Taking your users on a journey  
towards the springboard moment



[justaskusers.com](http://justaskusers.com) – tools for sense-making in user experience research  
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# The users who love you

- They use your product constantly, almost religiously
- They tell anyone how awesome it is
- They happily pay for it
- They are one of the best friends your company could have: a thriving, successful user.



# How did they get there?

- Everyone on Earth was a complete stranger to your product, not too long ago!
- How did they navigate from completely unfamiliar with your offering to intrigued, to exploring, committing, investing, and, ultimately, finding satisfaction on the other side?



# This is onboarding:

- “...guiding the uninitiated all the way to their own personal promised lands”

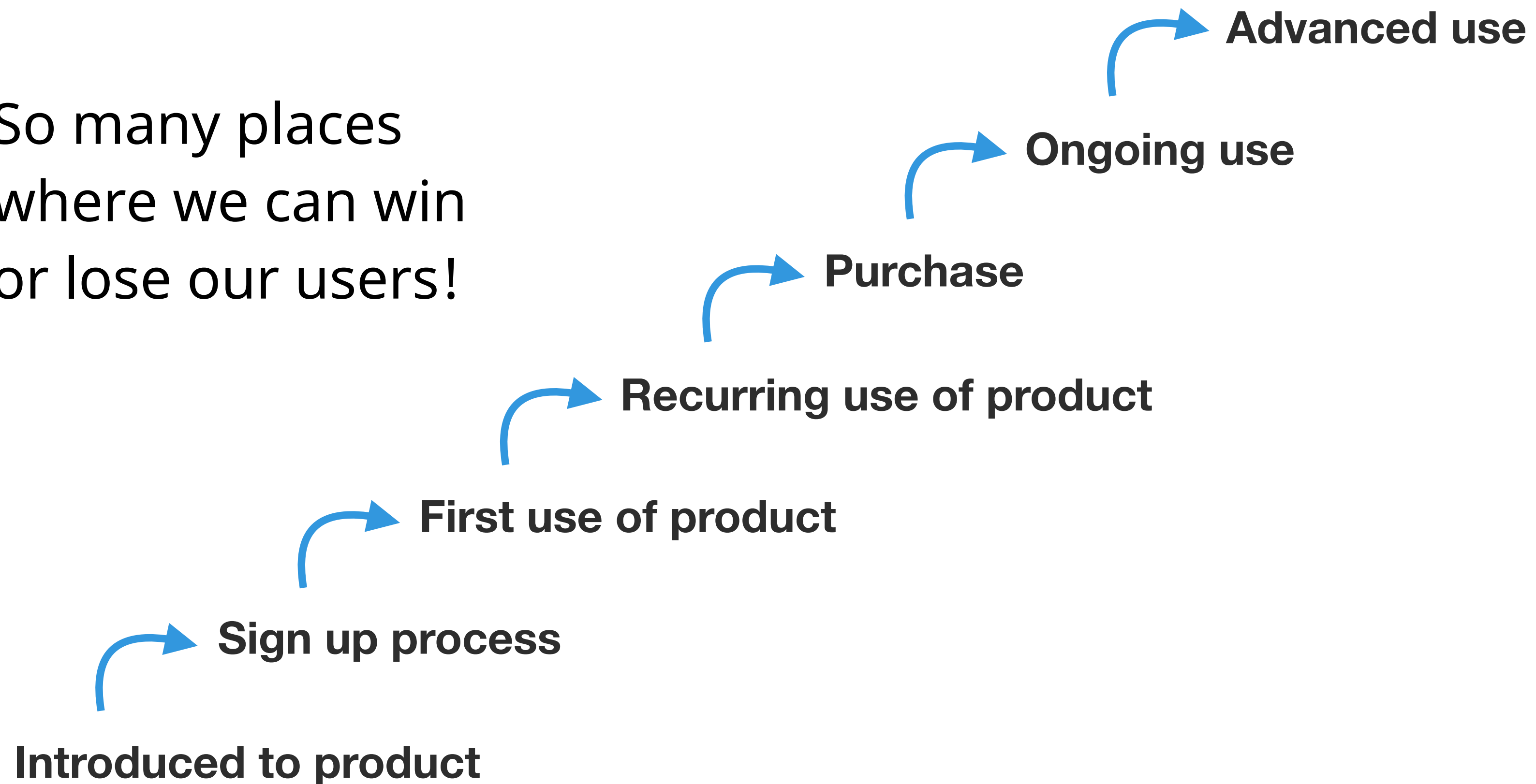
(Samuel Hulick, [useronboard.com](http://useronboard.com))



# A generic customer journey

Samuel Hulick, [useronboard.com](http://useronboard.com)

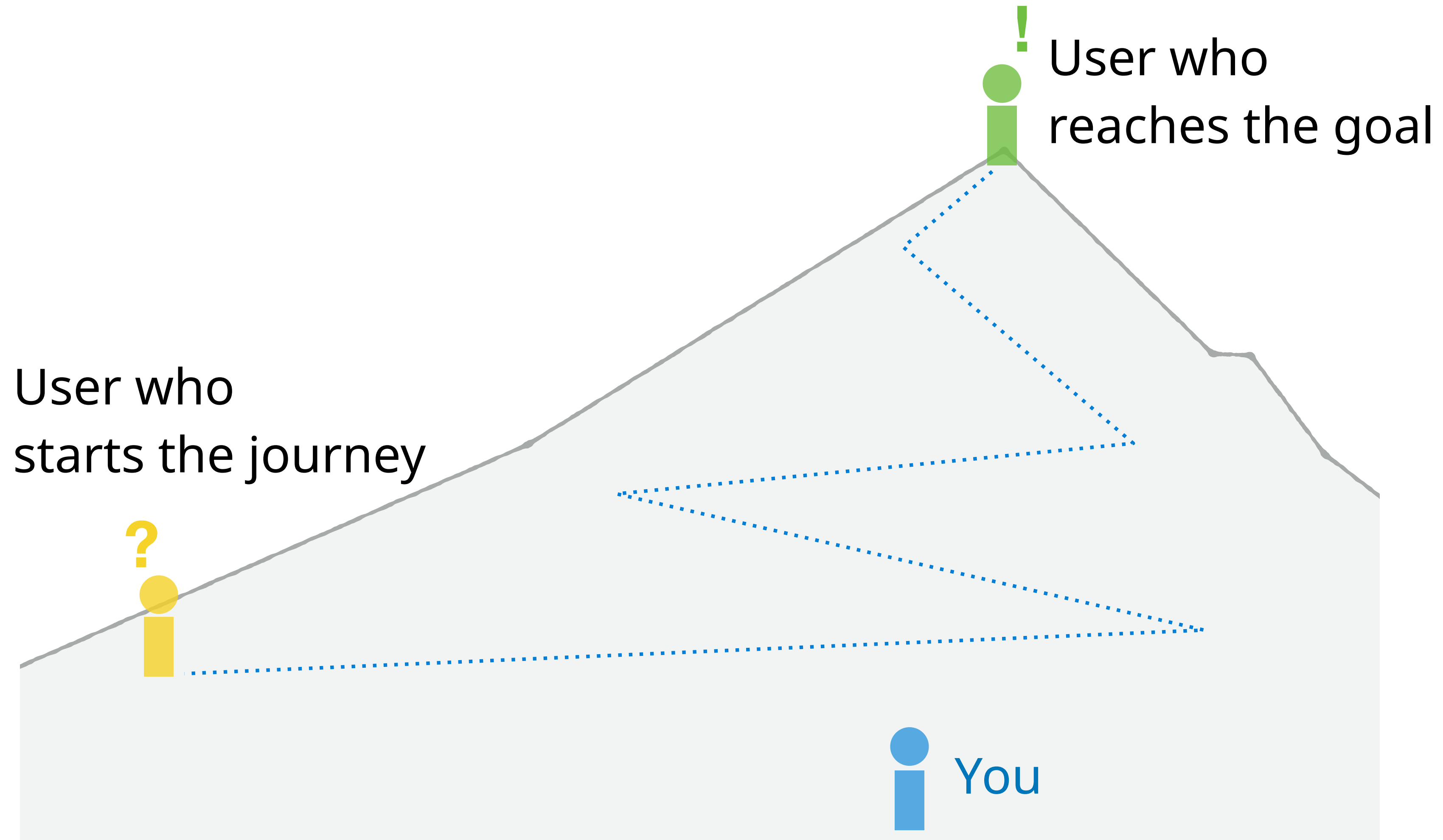
So many places  
where we can win  
or lose our users!





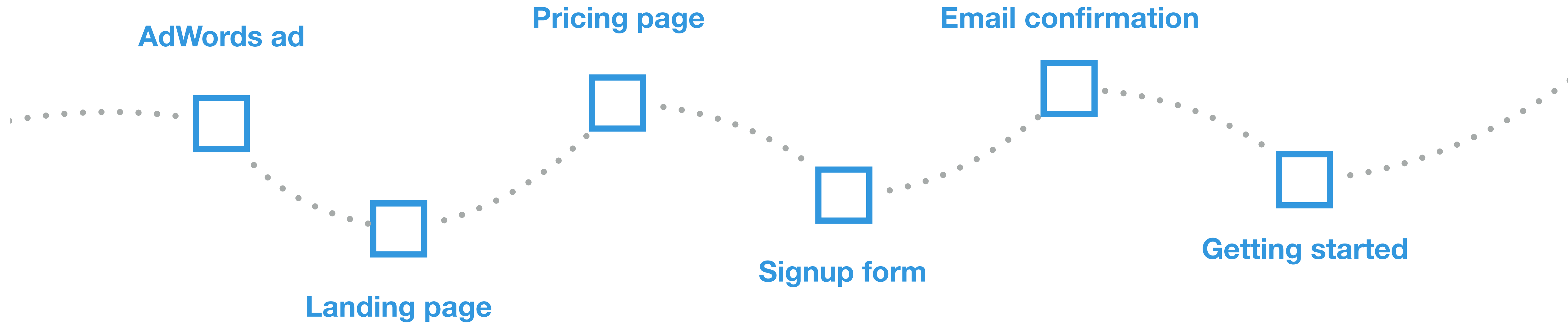
# Be a sherpa for your user

Samuel Hulick, [useronboard.com](http://useronboard.com)





# Touchpoints



- Collect and document the points where the user “touches” your company or your product on their way through the end-to-end customer experience



# You see the entire journey...

Samuel Hulick, [useronboard.com](http://useronboard.com)

Hey, what the heck  
am I doing here?



- But your user sees only *one screen at a time*...





# Inform and “nudge” them

Samuel Hulick, [useronboard.com](http://useronboard.com)



- At every touchpoint, give them the right trigger and the information they need to reach the next goal
- Gently “nudge” them to take the next step

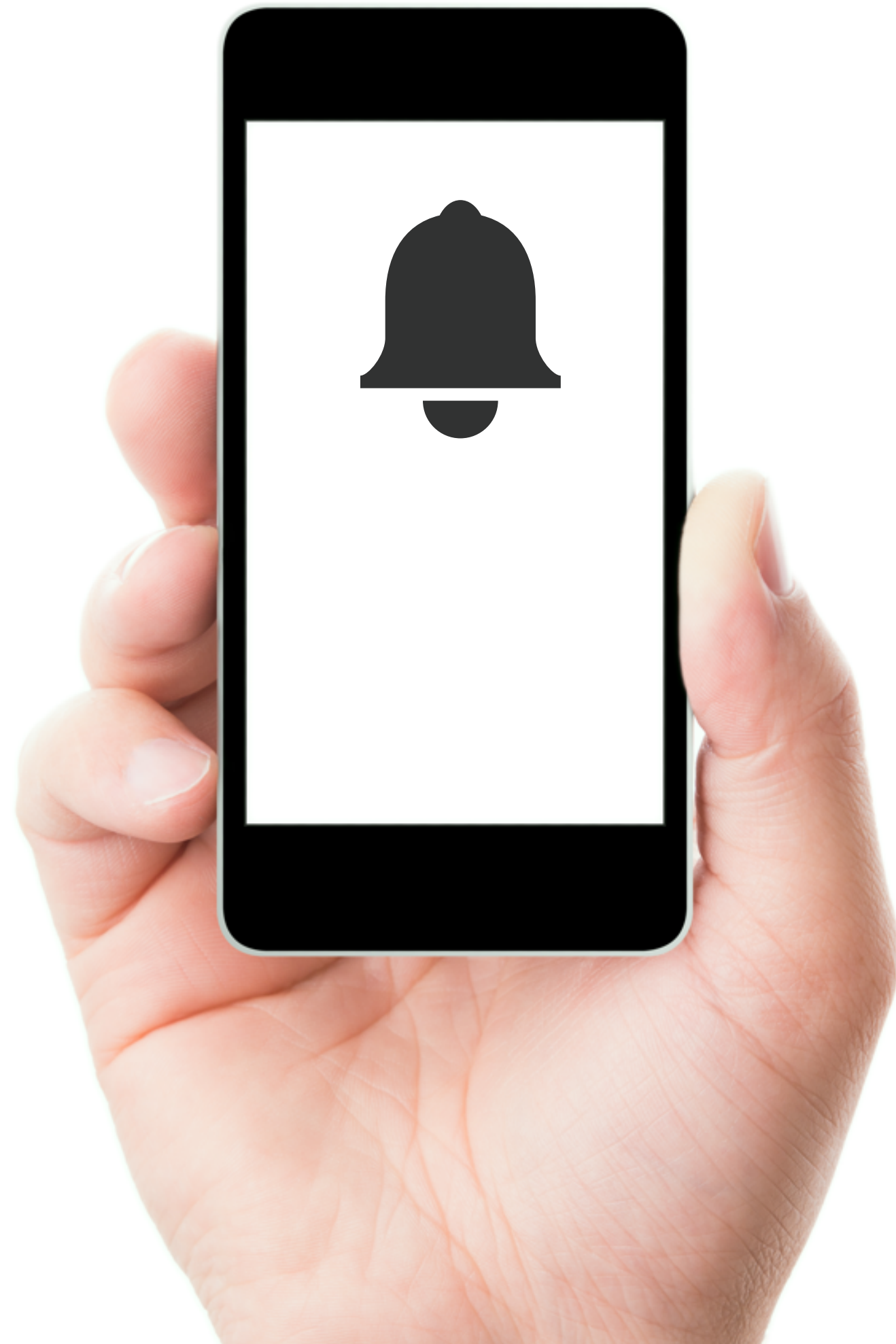


# The problem

- Users will not always follow your nudges
- Following you is a change in behaviour
- People change behaviour only under certain conditions



# Let's do an experiment



- Think of a situation where you did NOT answer your mobile phone!



# Fogg Behaviour Model

Dr. BJ Fogg, Stanford University

$$B = M \times A \times T$$

- For behaviour to occur,  
3 things have to be present, in the same moment:
  - Motivation
  - Ability
  - Trigger (also called “prompt”)



# Let's design this...

- To raise the user's motivation (M)
- and to remove roadblocks to their ability (A)
- Let's design triggers that will guide them (T)



# What will you need when...

Blanks, Karl: "Making Websites Win"

- You don't know what the product does
- You know what it does, but you don't know why you'd need it
- You aren't convinced that it will do what it claims to do
- You don't know whether it's compatible with your existing technology
- You think it's too expensive
- You don't trust the company
- You've never heard of them before. You are going to think about it



# Triggers must match the current “state” of the relationship

- What the user already knows and/or is able to do
- What the user must do now to make progress towards the goal
- What the user has done in the previous step(s)
- How much time has passed since the last step
- And ... what the product company needs to get revenue



# Kinds of triggers

- Visual guide that asks the user to focus on a certain element of the UI
- Step-by-step tutorial
- Email sent to the user
- Push message on the user's mobile phone
- Progressive profiling ("your profile is 60% complete")
- Numbered steps in a flow
- Invitation to a teammate
- Weekly status update by email





# Example

- The user has just signed up and knows nothing about how the product works
- The goal is 10 steps away
- In each step, the user must create a certain “thing”
- The user will get value and “a-ha” from the last “thing”
- **Which triggers would we design and when would they be activated?**



# Live Demo

Insights at <https://justaskusers.com>

- Let' see some triggers LIVE on screen...
- in a product called “Insights”  
(that we happen to have created 😊)
- “Insights” helps user experience (UX) researchers make sense of their research results, discover themes in user behaviour, and find opportunities to improve the design of their products

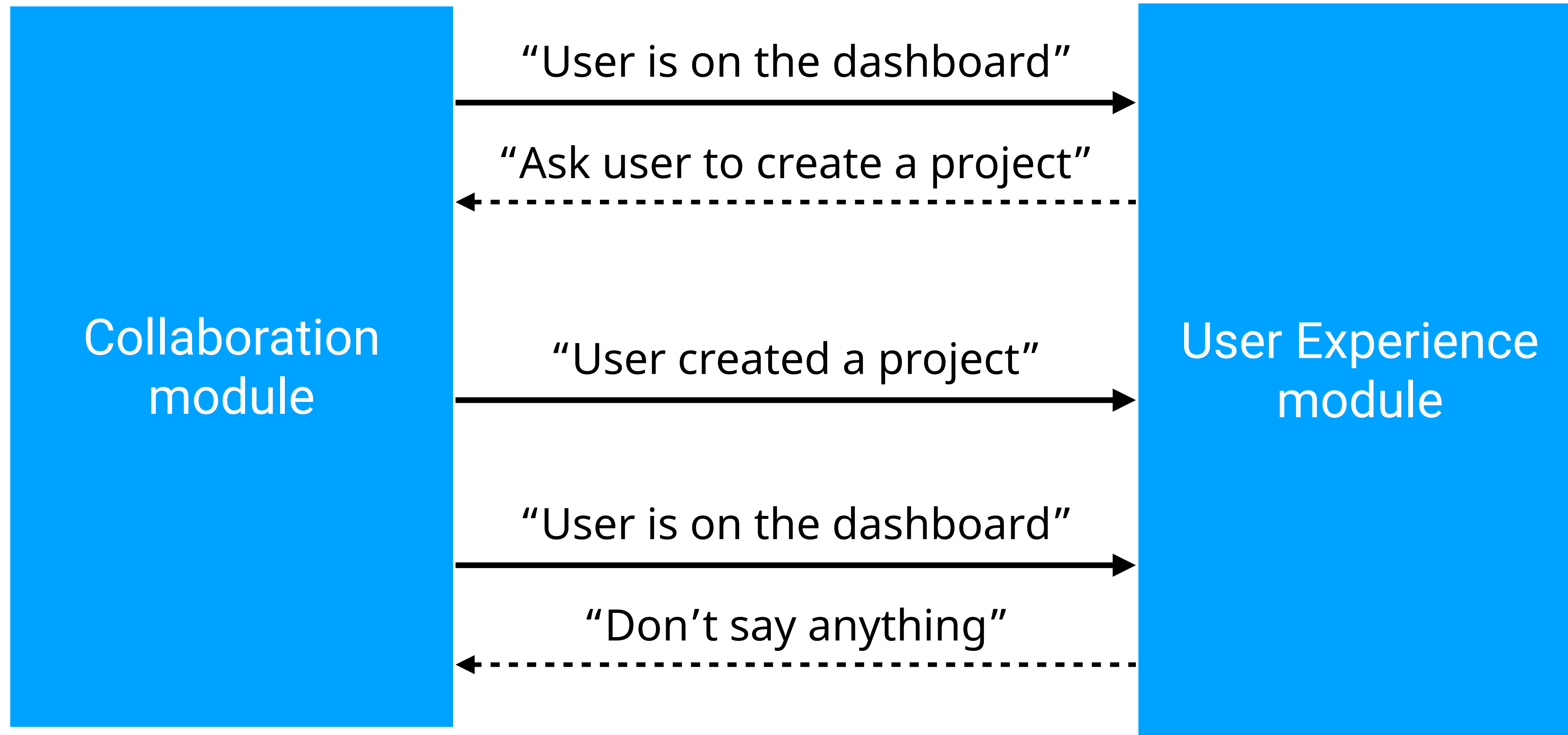


# Stateful onboarding

- Make your software learn what the user can already do
- When the user is in a certain UI situation, show her a trigger that gently nudges her to take the next necessary step towards the goal
- Let her choose between "DONE" and "LATER" and store the choice she has made
- Re-display the trigger after a suitable delay, mostly when the user did NOT achieve the next goal



# How *Insights* displays visual guides



The guide that is displayed depends on the user's skills. A skill is considered present after the user has completed an action. Skills expire after 60 days.

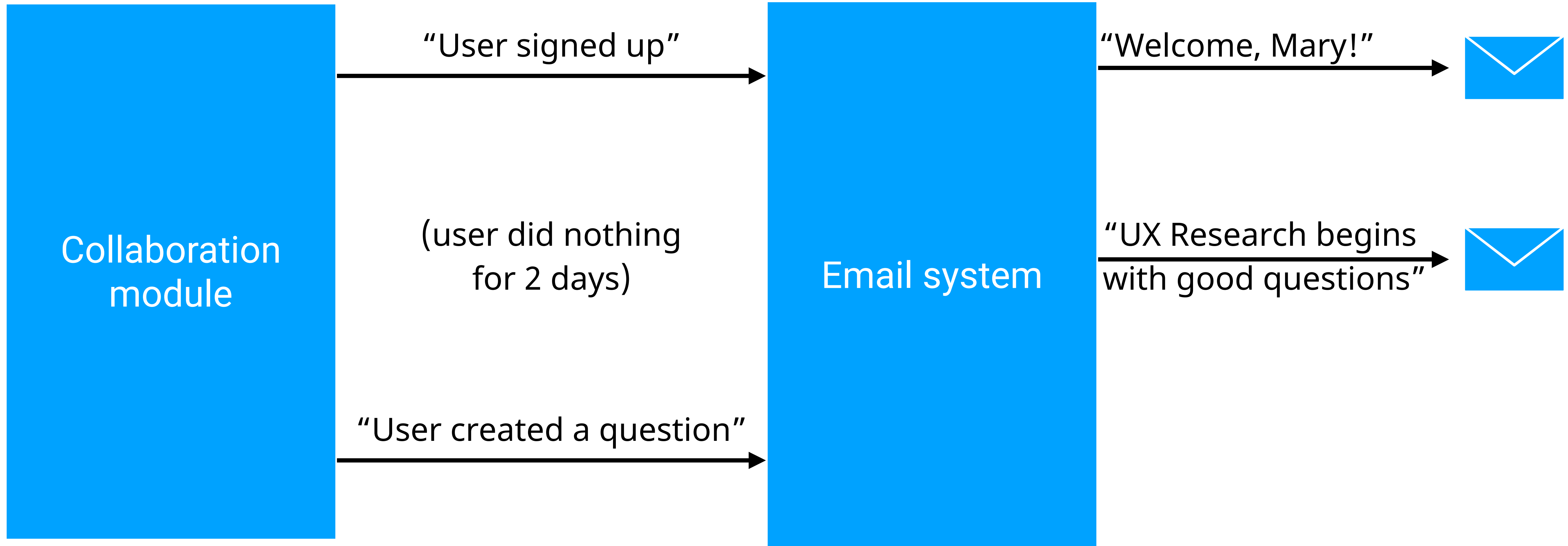


# Inside the UX module

Situation	Condition	Trigger to show	Behaviour on LATER	Behaviour on DONE
Dashboard	User does not know how to create a project	"How to create a project"	Snooze for 3 days, then check condition again	Snooze for 1 day, then check condition again
Dashboard	User does not know how to create a team	"How to create a team"	Snooze for 40 days, then check condition again	Snooze for 20 days, then check condition again
Studies in project	User does not know how to add a study	"How to add a study"	Snooze for 3 days, then check condition again	Snooze for 1 day, then check condition again
...	...	...	...	...



# Other triggers, e.g. email





# Results

- Before we had stateful onboarding, users turned away when they saw the empty dashboard or an empty project (even with proper “empty state” messages)
- Now, with a pre-filled sample project and visual guides, they go forward and complete the next steps
- Some are really excited and start to work really fast
- But...



# Work to be done

- We still have to activate the users better...
- ...between downloading the lead magnet and sign-up
- ...between sign-up and the week after that
- ...during a long-running user study
- ...between one user study and the next





# Learn more...

- Visit our website at <https://justaskusers.com>
- Sign up for a free trial
- Tell us how it works for you – we LOVE feedback!

