Perpendicular Angel Design

Organizing and simplifying, one illumination at a time

An Event Apart 2017: Onboarding for any situation by Krystal Higgins

Posted on **April 4, 2017**

Krystal Higgins presented on what it means to onboard users to your website, how long that process lasts, and how we can make it more successful. She draws some of her research on the process of onboarding new hires at companies, which is a pretty nifty analogy.

She also had a piece of foam board that she passed around so we could write down how and when we thought our companies/applications stopped the onboarding process on the web, thus gathering data while providing it!

An Event Apart 2017 Onboarding for any situation by Krystal Higgins (pdf)

Anne Gibson
@perpendicularme

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How do we begin with a new user? Before we do that - let's think about the end #AEASEA

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Anne Gibson
@perpendicularme

We all tend to concentrate on the first-time setup way too much. First impressions are important but designs don't scale #AEASEA

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Erin Walker (Joyce)
@E3Writing

When we focus on just the first run experience, we tend to abandon users for every other run. @kryshiggins #aeasea

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jared bishop
@bishopart

User usage changes and evolves over time. When does it end? Does it ever end?@kryshiggins #aeasea

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There's no simple end to "onboarding" - when does it end in your product? #AEASEA

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First run is like orientation at a new company. Single event, one-size-fits-all, limited results #AEASEA

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We want onboarding to carry users for the long run. To design beyond that first run we look at opportunities over time #AEASEA

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See how diverse methods work better. Look at long-term guidance in products #AEASEA

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Onboarding's job:
- familiarize user
- learn about the user
- convert to signed up
- guide to next steps#AEASEA

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Anne Gibson
@perpendicularme

New hire onboarding is often planned over months, not minutes. They plan out to the 6-12 month mark #AEASEA

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Stephanie
@seaotta

Research suggests that you need more than one day to onboard a new user. #aeasea

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Days 3-7 are most critical for users to decide whether to uninstall an app. Don't onboard just in the first session #AEASEA

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jared bishop
@bishopart

Some video games have developed wonderful onboarding experiences. @kryshiggins #aeasea

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Lumosity as an example: learn about the user, which helps user self-reflect too #AEASEA

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Familiarization: sends users right into 3 games to try #AEASEA

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Familiarize users with mechanics of games. Recap at the end, start to hint of subscription plan. #AEASEA

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At the end, stats and info… hint to subscribe. Next day, invitation to engage & subscribe via email #AEASEA

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New games that are locked because you aren't subscribed start to show after a few days… info about subscription only services #AEASEA

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Even after subscription, games have onboarding, new features have onboarding #AEASEA

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Erin Walker (Joyce)
@E3Writing

Once subscribed, immediately engage with new features now unlocked - driving engagement, not just adoption. @kryshiggins #aeasea

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Wealthfront does engagement well too: first info about you, then interactive dashboard to learn more… then save the plan #AEASEA

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Duolingo subtly introduces new features after the user has already been onboard for a little while #AEASEA

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Techniques for initial onboarding shouldn't be limited to initial moments. New or existing features can use it #AEASEA

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Use onboarding tactics for big redesigns #AEASEA

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ashleigh 💁🏼‍♀️
@ashleigh8

Follow

Minimizing change aversion for the Google Drive launch research.google.com/pubs/pub41221.… #aeasea

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Conor Meagher 👨🏻‍💻
@conrmahr

Onboarding for Redesigns
- Prepare
- Familiarize
- Guide
- Learn
via @kryshiggins #aeasea

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Yahoo Mail provided an onboarding-like experience when redesigning mail, including soliciting feedback #AEASEA

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I can't help but wonder what the mail will look like if/when they redesign and rebrand for the Verizon / AOL / Yahoo! = Oath! merger.

Stephanie
@seaotta

Greet and guide existing users through a redesign and offer the option to provide feedback. #aeasea

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Sometimes people stop using your product and come back later. What changed since the last time i used it? What changed about me? #AEASEA

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Stephanie
@seaotta

Turbotax - takes a moment to update me on what's changed and then asks what's changed in my life to provide the right experience. #aeasea

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Everyone has diverse needs in onboarding. Onboarding isn't a fixed experience that fits everyone #AEASEA

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Expectations, motivations, learning styles all affect onboarding #AEASEA

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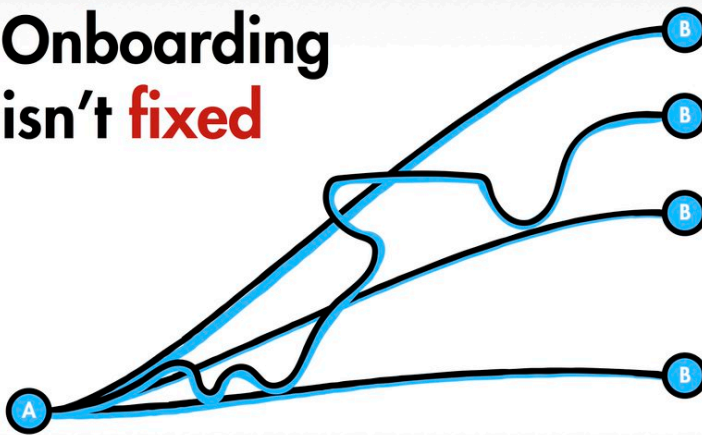**Stephanie**
@seaotta

Onboarding is not a fixed path for users. Maybe one user needs more help than another. Not all users are equal. #aeasea

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A Brave New
@abravenew

If you thought every on boarding experience is the same @kryshiggins would (correctly) suggest otherwise

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A referral from a friend may give us expectations that are pre-set. A deep link, different expectations #AEASEA

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Who's seen Github's homepage lately? *laughter* Yeah, we all deep link in #AEASEA

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Moving from one platform to another may need less guidance than a first use case. #AEASEA

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Moving from a competitor brings in the mental models from the competitor experience along for the ride #AEASEA

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Chad
@lingokid

"People learn new material best when they encounter it multiple times and through multiple modalities"
Linda Nilson #aeasea @kryshiggins

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People use many different learning styles depending on the situation (there are different styles but we don't stick with 1) #AEASEA

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Empty states as a default give guidance to an experience. Air Wander shows what you will need to fill out #AEASEA

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@conrmahr

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Q: Do users change their settings?
A: Less than 5% change default settings.
via @jmspool #aeasea

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Stephanie
@seaotta

Embrace the value of strong defaults. Research says that most people won't change those if we set them on the best path.
#aeasea

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Inline guidance: for once you have content on the pages. next door slides filling out profile #AEASEA

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First time you create a post, Medium gives some inline help, which silences itself as soon as you start typing #AEASEA

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Conservation.org will let you vote on topics, then inline switches to email sign-up to get results of vote #AEASEA

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Conservation International Home

We know that human beings are totally dependent on nature — and that when we work to save nature, we're really working to save ourselves. CI is helping

conservation.org

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Reactive guidance: twitter, the first time you mute you'll get guidance. Doesn't appear until you initiate intent #AEASEA

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Proactive guidance: trying to get ahead of a user getting stuck #AEASEA

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Proactive guidance isn't just takeover tutorials (which don't feel very integrated) #AEASEA

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Evernote will do lightweight tips on new features. #AEASEA

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Emails that provide info about doing a task also count as proactive guidance #AEASEA

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On-demand guidance will always be necessary! Have a centralized area for help, chat, join discussions #aeasea

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Stephanie
@seaotta

On-demand guidance - there will always be things we can't predict at times we don't expect them. #aeasea

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Stephanie @seaotta   3 Apr
On-demand guidance - there will always be things we can't predict at times we don't expect them. #aeasea
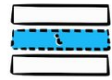
Stephanie
@seaotta

A good onboarding experience will make access to that on demand help easy to find. #aeasea
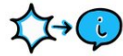
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Diverse toolkits for extended onboarding. Use more than one approach #AEASEA

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Long-term guidance: but first, the weaver bird. (Masked Weaverbirds are awesome.) #AEASEA

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Long-term guidance

@kryshiggins

Anne Gibson
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Like us, weaverbirds took a lot of time and multiple nests to build beautiful structures. #AEASEA

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Even weaverbirds need to learn not to suck! It's not just us!

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Long-term Onboarding doesn't have to happen overnight but can start with some activities #AEASEA

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Start at the end to reveal key actions. #AEASEA

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"If you know the intermediate-use destination, you can strip stuff away to figure out what essentials to reveal for first-time use."

Jonathan Korman / @miniver

Long-term guidance
Map your key actions

@kryshiggins

Shout out to @miniver by @kryshiggins #AEASEA

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Look at core users. Look at unsuccessful users. What do you want to deliver? What do you want to not deliver? #AEASEA

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@perpendicularme

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Like a maze, sometimes it's easier to solve if you start at the end and trace it to the beginning #AEASEA

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Anne Gibson
@perpendicularme

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What do core users do? Many subscribe to news letter… many of those after first sale. That came after posting, came after creating #AEASEA
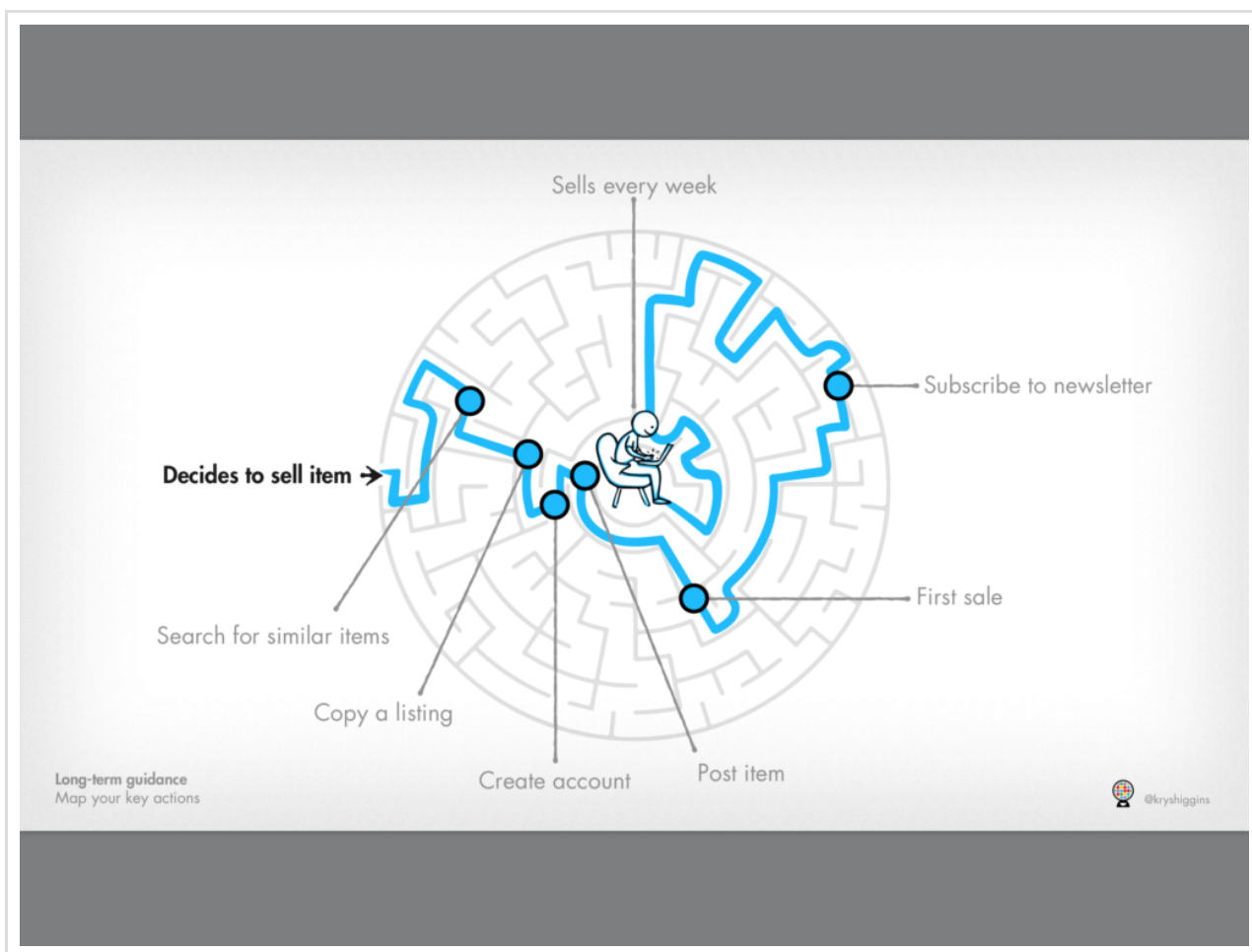
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Anne Gibson
@perpendicularme

Follow

What if most users created their first post after copying an existing listing, which happened after they decided to sell? #AEASEA

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And since those tweets above make almost no sense without the slide…

Anne Gibson @perpendicularme **Follow**

What if the unsuccessful users abandon a draft they were writing from scratch? Now we have a spot to call out copying a listing #aeasea

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Anne Gibson @perpendicularme **Follow**

Facebook found people who friended 7 people within 10 days of signup were more likely to stay engaged than others #AEASEA

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Anne Gibson
@perpendicularme

Interviews & surveys, diary studies, cohort analysis can all help you understand which key actions are worth guiding #AEASEA

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Anne Gibson
@perpendicularme

Break guidance down into modules. Find areas for guidance in a key action #AEASEA

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Anne Gibson
@perpendicularme

What launches the action (trigger), activity (heart of the action), closes action (feedback?) #AEASEA

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Anne Gibson
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By breaking action down into these 3 accounts we can find opportunities for onboarded guidance #AEASEA

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Anne Gibson @perpendicularme

Onboarding can then be little modules that can be moved around and varied as the user move through the process #AEASEA

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Anne Gibson @perpendicularme

One reason we get stuck in a one-use mindset is because we think people need to see something just once to grok it #AEASEA

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Conor Meagher 👨‍💻
@conrmahr

Activity for Onboarding
- Skills needed
- Restating the benefits
- Subtasks and obstacles
via @kryshiggins #aeasea

3:11 PM - 3 Apr 2017

Conor Meagher 👨‍💻
@conrmahr

Follow-up for Onboarding
- Feedback
- What next?
via @kryshiggins #aeasea

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Anne Gibson
@perpendicularme

Repetition is critical to learning new concepts and actions
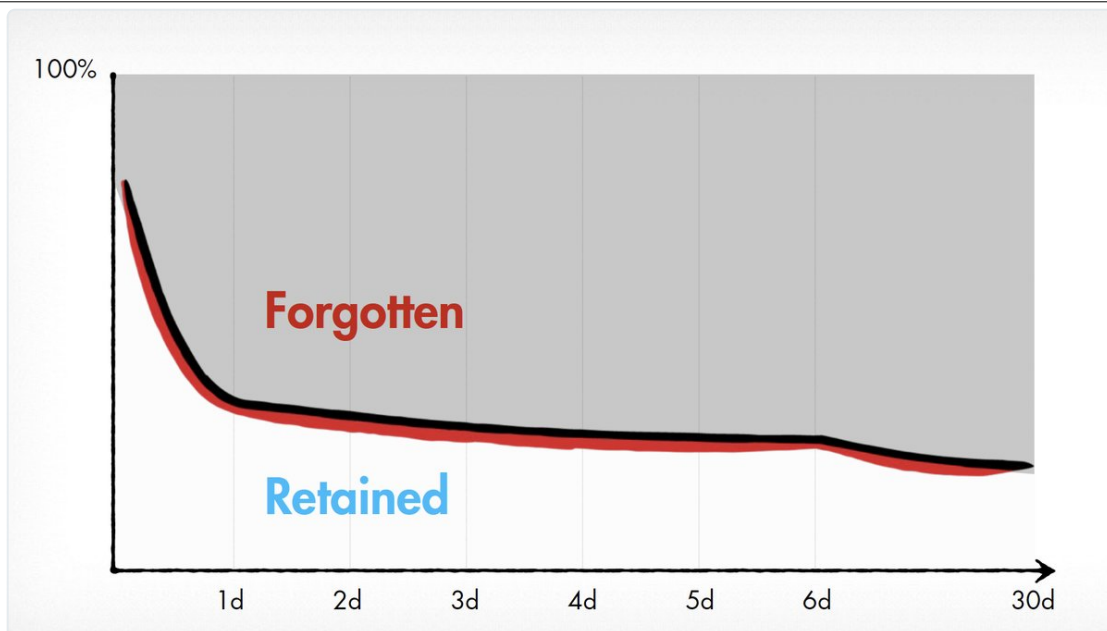#AEASEA

3:11 PM - 3 Apr 2017

Anne Gibson
@perpendicularme

if we show something just once, we're up against the forgetting
curve. #AEASEA

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100%

Forgotten

Retained

1d 2d 3d 4d 5d 6d 30d

---

jared bishop
@bishopart

Forget me not #aeasea @kryshiggins

3:13 PM - 3 Apr 2017

2   1

Stephanie @seaotta   3 Apr
If we show something just once, we're up against a forgetting curve.
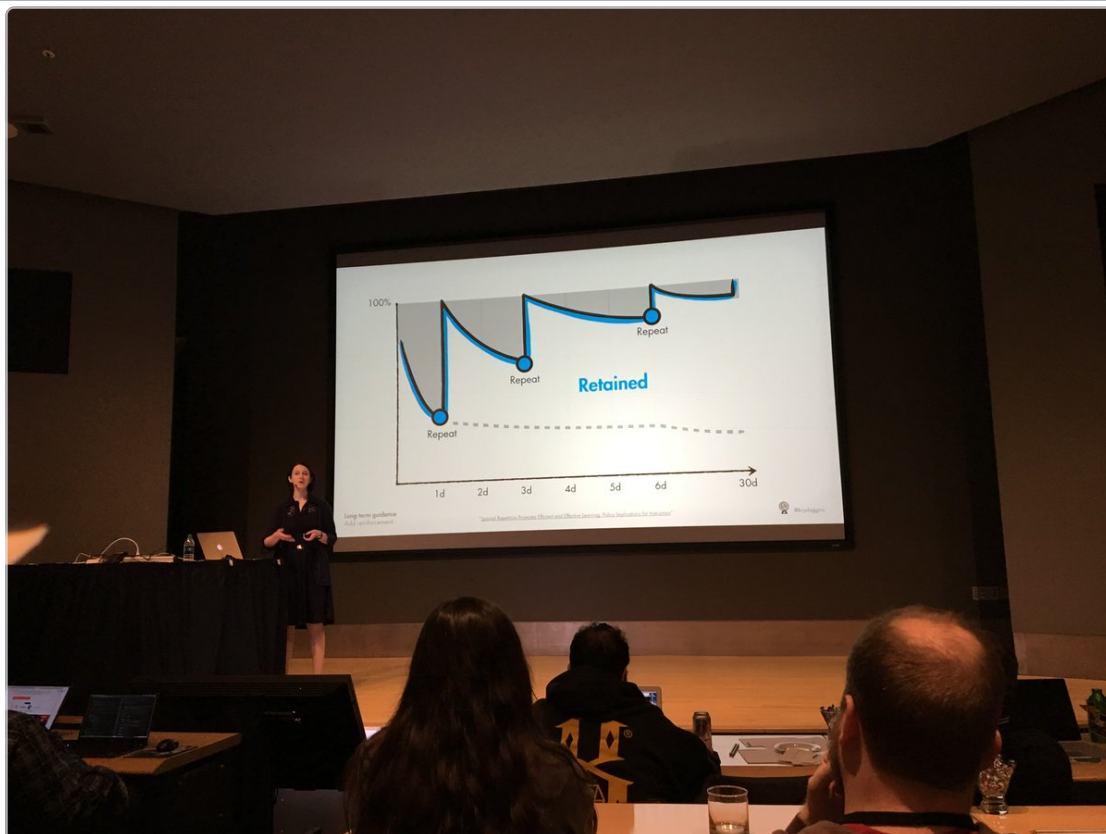#aeasea

Stephanie
@seaotta

Immediately after you learn something you begin forgetting it.
You're lucky if you retain 1/3 of it. #aeasea

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1   1

The 1/3 number is **after 24 hours**, which is pretty mean of our brains if you ask me. It also explains why a week of spring break can totally destroy the momentum a teacher has in a semester of teaching concepts that build on each other.

Reframing and repetition are so so important.

Anne Gibson
@perpendicularme

In the teaching world this is called spaced repetition - defeats the forgetting curve #aeasea

3:13 PM - 3 Apr 2017

2   1

Stephanie
@seaotta

We're aiming for reinforcement not mindless repetition, vary location, method & frequency of guidance to help drive home key actions #aeasea

3:16 PM - 3 Apr 2017

1

Anne Gibson
@perpendicularme

What are the end conditions? Can user dismiss? Stop showing after X engagements or dismissals? #AEASEA

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1

Anne Gibson
@perpendicularme

The act of designing for reinforcement will also steer us away from one-size-fits-solutions in our products #AEASEA

3:15 PM - 3 Apr 2017

1

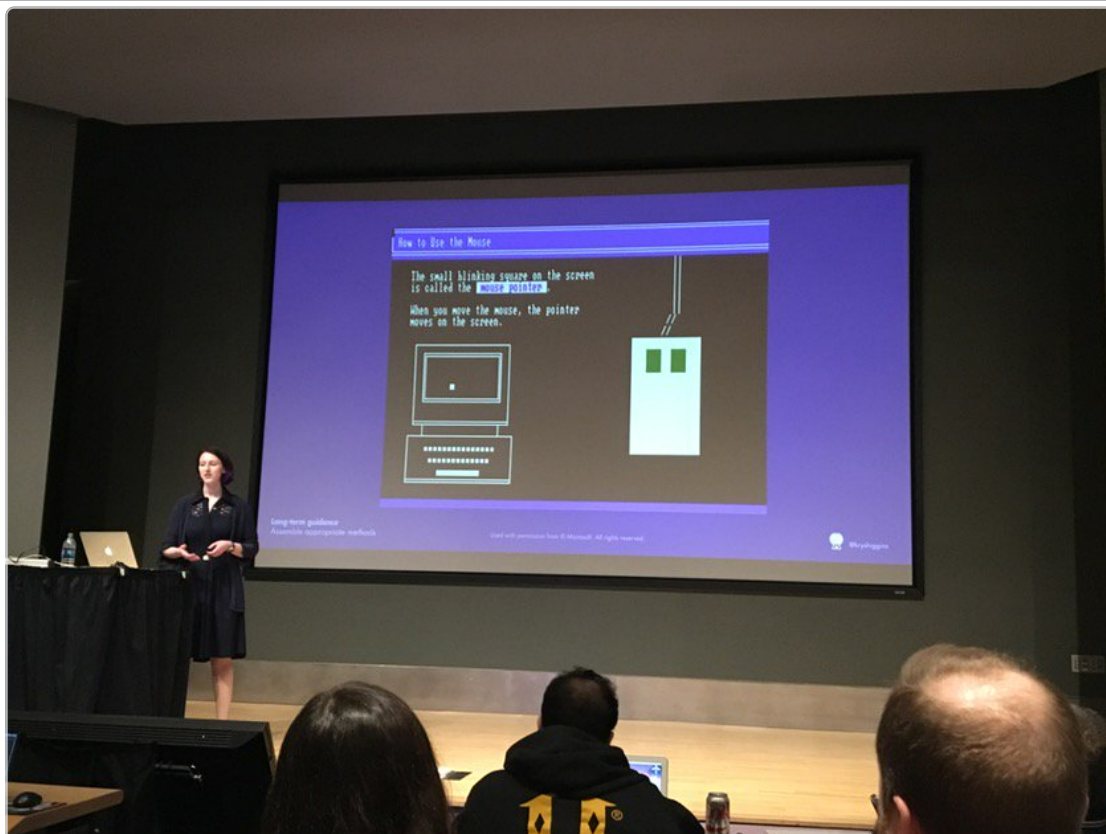**Anne Gibson**
@perpendicularme

Assemble appropriate methods for our user and product situations. #AEASEA

3:16 PM - 3 Apr 2017

Anne Gibson
@perpendicularme

How to use a computer mouse from 1983. Probably not appropriate today #aeasea

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1

Anne Gibson
@perpendicularme

Is the user exploring, or on a mission? Is the product an established space, or brand new? Map right guidance to each segment #AEASEA

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1

Anne Gibson
@perpendicularme

Exploratory/Established. Lightweight general guidance more appropriate #AEASEA Email doesn't need an up-front tutorial

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Anne Gibson
@perpendicularme

On a mission/established: lightweight focused guidance around that specific mission #AEASEA

3:18 PM - 3 Apr 2017

Anne Gibson
@perpendicularme

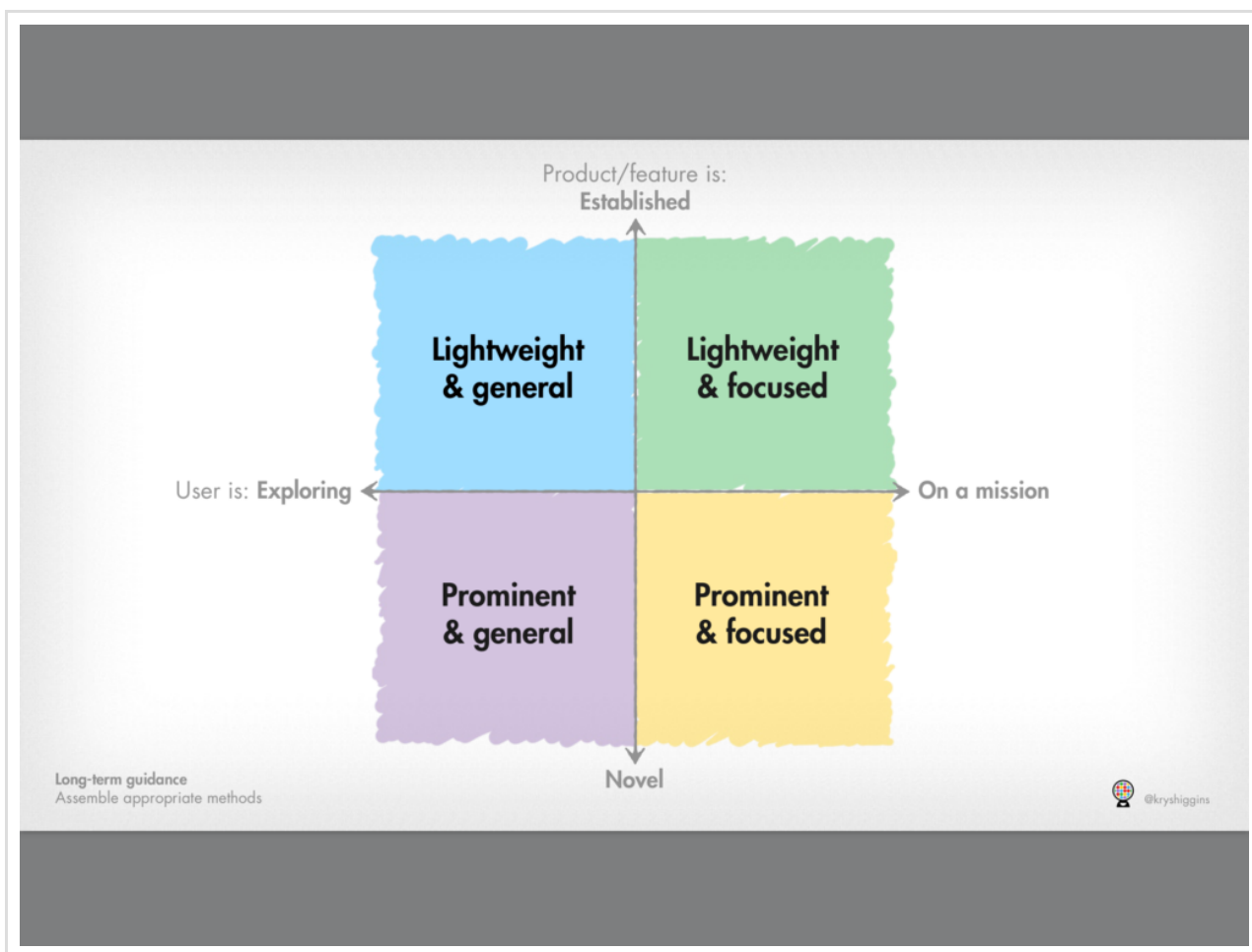Exploring/novel space: prominent and general guidance #AEASEA

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Anne Gibson
@perpendicularme

On a mission/novel feature: prominent and focused guidance. #AEASEA

3:20 PM - 3 Apr 2017

Product/feature is:
Established

Lightweight & general

Lightweight & focused

User is: Exploring ← → On a mission

Prominent & general

Prominent & focused

Novel

Long-term guidance
Assemble appropriate methods

@kryshiggins

Anne Gibson
@perpendicularme

Third dimension is what's appropriate for *your* product's identity and brand. Don't disrupt the harmony of your site #AEASEA

3:20 PM - 3 Apr 2017

Anne Gibson
@perpendicularme

Include a philosophy for onboarding and user education for design systems in pattern libraries and site audits #AEASEA

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Anne Gibson
@perpendicularme

Set learning checkpoints. 5 second test can help determine content clarity and first impressions #AEASEA

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Anne Gibson
@perpendicularme

Companies with good new hire onboarding check in through interviews, surveys, focus groups #AEASEA

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@perpendicularme

Beneficial to make the user an active player giving us feedback through onboarding #AEASEA

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Anne Gibson
@perpendicularme

Make feedback part of the core experience in the product #AEASEA

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@perpendicularme

when something new or something changed is introduced, solicit feedback #AEASEA

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Anne Gibson
@perpendicularme

Solicit feedback when something is cancelled - a subscription or free trial #AEASEA

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Map your key actions

Break into modules

Reinforce

Assemble appropriate methods

Establish checkpoints

Long-term guidance
@kryshiggins

Anne Gibson
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Follow

Long-term feedback reviewed #AEASEA

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1

jared bishop
@bishopart

Follow

If you start with the end in mind you'll be able to make sure you heading in the right direction every step of the way. @kryshiggins #aeasea

3:26 PM - 3 Apr 2017

Conor Meagher 👨🏻‍💻
@conrmahr

"Don't design just for the first run, design onboarding for the long run." - @kryshiggins #aeasea

3:27 PM - 3 Apr 2017

Stephanie
@seaotta

Onboarding shouldn't be designed as a standalone process for a first-run experience. It should carry the user through the long run #aeasea

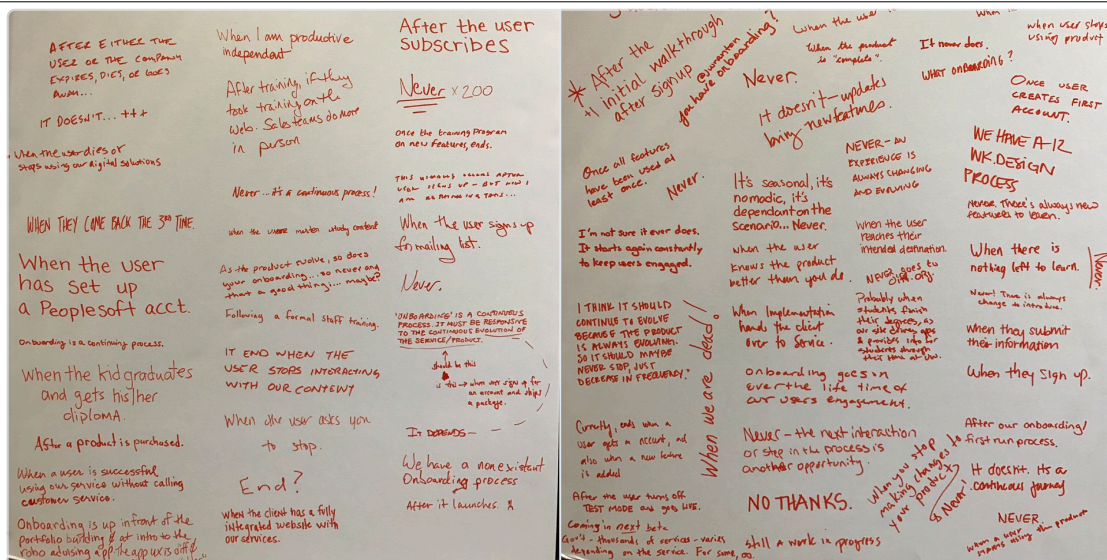3:27 PM - 3 Apr 2017

1

Luke Wroblewski
@lukew

Taking a long-term approach to on-boarding: lukew.com/ff/entry.asp?1…

my notes from @kryshiggins talk at #aeasea

3:41 PM - 3 Apr 2017

24   106

Krystal Higgins
@kryshiggins

I asked where onboarding ends in your products, and #aeasea answered! Here's what's y'all wrote:

3:41 PM - 3 Apr 2017

6   22

Krystal Higgins
@kryshiggins

Wrote some new stuff & updated some old stuff on user-onboarding and longer-term guidance. Enjoy! kryshiggins.com/long-term-guid…

10:13 AM - 28 Mar 2017

1   4

Krystal Higgins @kryshiggins   28 Mar

Wrote some new stuff & updated some old stuff on user-onboarding and longer-term guidance. Enjoy! kryshiggins.com/long-term-guid…

Krystal Higgins
@kryshiggins

And, I've updated "From first run to the long run" on opportunities for onboarding tactics across the user journey

kryshiggins.com/from-first-run…

8:16 PM - 1 Apr 2017

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