

How Design Thinking lead us to redefine our customer onboarding strategy

Onboarding new customers is one of the most critical stages in any service experience; if people are happy with a service from the beginning, chances that they'll continue using it are high.

In Exact Online, we run a project to improve the onboarding experience of new customers with our product, to increase the chances that they will continue to use our service over time. In this article, we tell you more about how Design Thinking enabled us to discover the biggest challenges users experience with Exact Online during their first 6 months, and to come up with solutions to make their onboarding experience more pleasurable.

The problem

It all started when we found out that the revenue we are losing from customers who churn during the first six months with our product is higher than the revenue we loose from customers who overcome the first 6 months period. We knew there are multiple reasons that can lead to churn during the onboarding phase, and that we would only be able to tackle some of those cases by improving the experience with our product.

What we didn't know was what to focus on; what of all possible aspects of the experience would make the biggest positive impact. Should we focus on showing the possibilities of the software to users? Or is it more important to teach them how to use it or how bookkeeping works? Do we need to make the most popular feature more user-friendly? These are the type of questions Design Thinking helped us answer. How? By discovering what our customers were experiencing when buying our software, and based on this, identifying the biggest opportunities to improve it.

The process

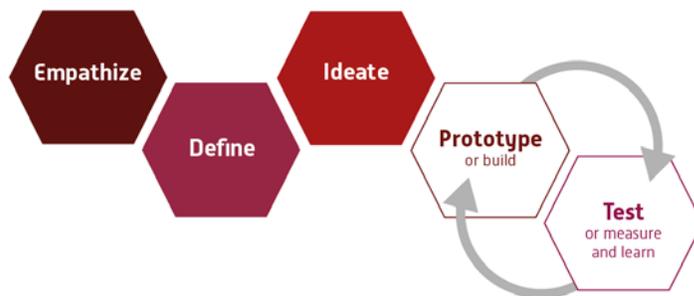


Figure 1. Stages in the Design Thinking process. Empathize, define and ideate are the stages of the project we describe in this article.

Empathy

Together with different stakeholders, including product marketers, designers, product owners and consultants, we started by mapping the current experience.

We then interviewed 21 customers who had recently started with Exact Online. We segmented them in the following 3 groups:

- users who just bought Exact Online (we asked them mainly about needs and expectations);
- users who have (partially) completed the setup;
- and users who recently started using our product.

The interviews helped us empathize with them and get different ideas on what frustrated and made them happy during the first months with our product. Among the findings, we discovered 7 possible problems in the current experience:

1. Users perceive **information in Exact Online as incomplete**, either because they use the software as a complementary tool or because they are just starting.
2. More **bookkeeping knowledge** than our users have is required to set up and use the software.
3. Users expect to have to invest **less time, effort and training** in Exact Online than what they actually have to invest.
4. An **accountant is needed** to use Exact Online and this is not what users expect.
5. The software does not give enough **confidence** to users (they are afraid of making mistakes).
6. General **ease of use** of the software is low.
7. The **setup** process is expected to be easier; users require more **guidance** to set it up.

However, since the results were qualitative, we did not know if they were particular cases of those customers, or if they were common to multiple customers.

Definition

To validate and prioritize the possible topics to approach with the redesign of the experience, we run a survey. The survey included questions to check the popularity of the 7 problems and other insights elicited from the interviews. It was completed by 193 participants that were within their first 6 months with our product (in one of the 3 segments mentioned above).

We analyzed all replies, and used the significant results to draw conclusions about the key topics to tackle in the onboarding redesign. These conclusions were translated into 4 design principles (see Figure 2). As regards the 7 problems identified during the interviews, we validated problems 1, 5 and 7. Problems 2, 3, 4, and 6 did not seem to affect the majority of users.



Layered expert guidance

Expert help is required to set up and use Exact Online. The product has to support this need by providing expert help from the beginning and in context.



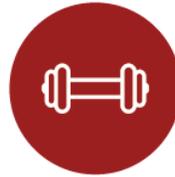
Supported collaboration

Guidance is needed by all users, and in particular by those who work with an accountant or consultant. Their collaboration needs to be supported in product, so that users know what to do by themselves and what to expect from the experts.



Gradual full activation

Most of our customers buy Exact Online to use it as a main tool for their business. Onboarding guidance has to ensure the absolute basics are set up (or defaulted) from the beginning, and then motivate users to complete a full product activation over time.



Practice opportunities

Users expect to practice before setting up and using Exact Online. They find documentation, videos and other available materials useful. Product onboarding must give new users the chance to practice.

Figure 2. Design principles that guided the design of a new onboarding strategy

Ideation

The design principles triggered our creativity. They challenged us to explore possible solutions in product that would help users overcome the main problems in the old experience and highlight core values of the product (see Figure 3).

How could we provide expert help and activation possibilities gradually, to avoid overloading users with new information? How could we let them practice while using the software? What could support the collaboration better between users, consultants and accountants? These are the type of questions we answered with different designs.

After multiple brainstorm, feedback and refinement sessions, we selected and combined the ideas into one final concept that approached the 4 principles, and that fitted the current product. We explain the key elements of the concept in Figure 4.

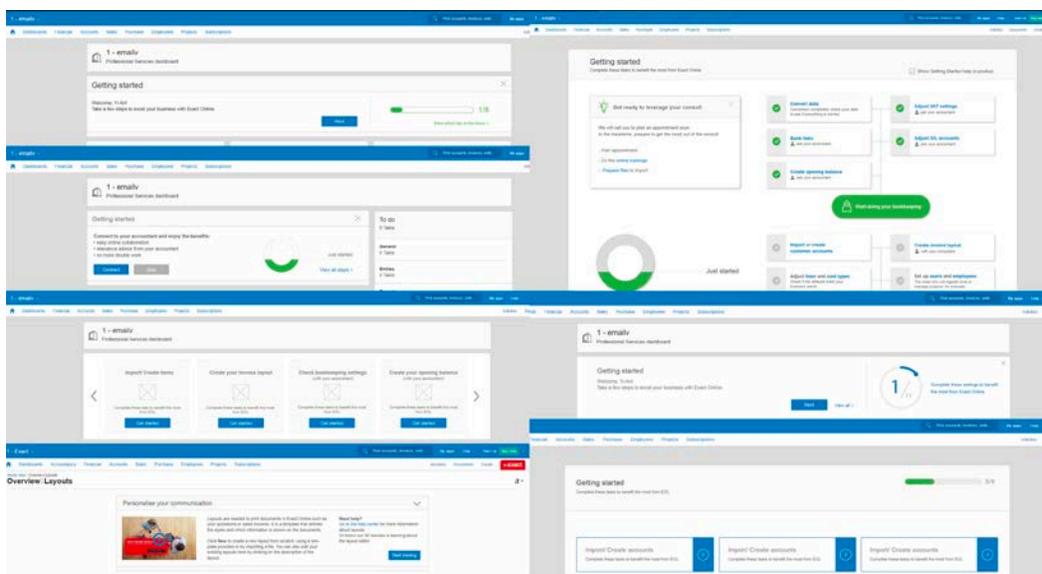


Figure 3. Design alternatives

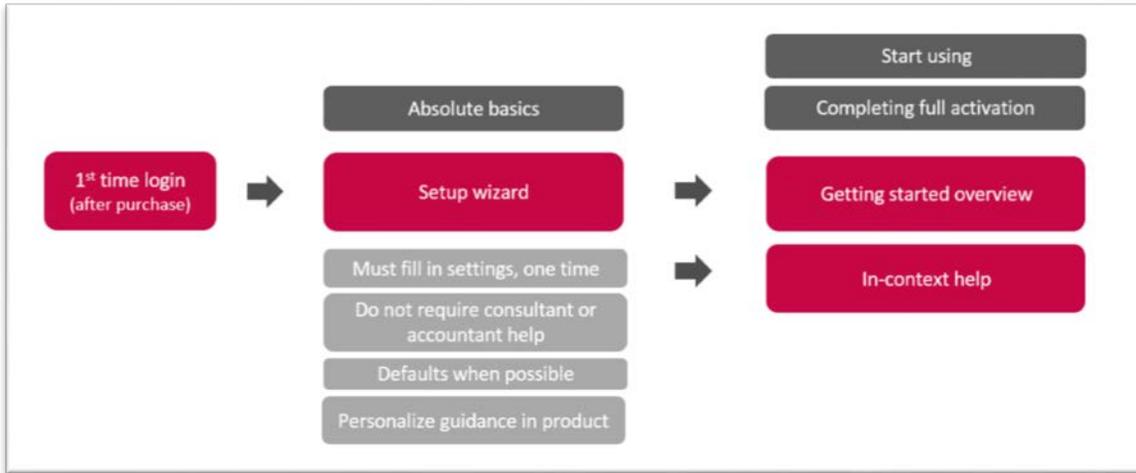


Figure 4. Onboarding strategy summarizing the combination of ideas and elements in the new experience.

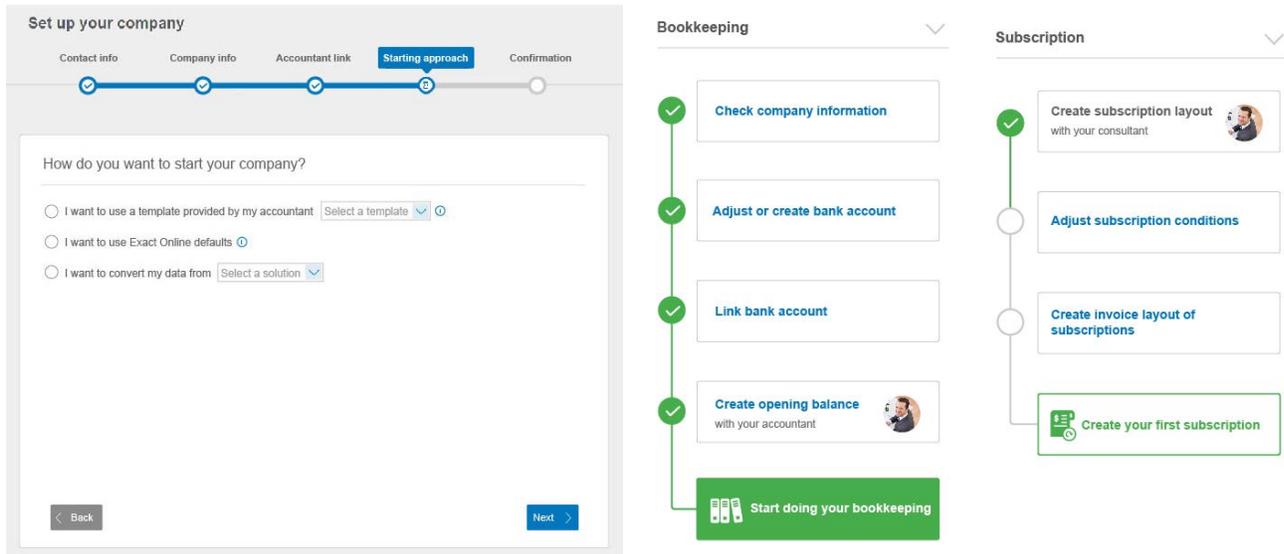


Figure 5. Samples of some of the new elements in the redesigned experience.

The outcomes

Design Thinking organized our team process and mindset, enabling us to discover the core aspects of the product experience we needed to improve, and leading us to create a new better experience.

We've prototyped the best idea (Figures 4 and 5) and tested it with 5 users. We are still iterating on the design while building a minimum viable product experience (MVP) in our current product. We will use this MVP to experiment and learn from a controlled group of customers.

New Professional Services users will be the target group of our first pilot case. A subset of customers starting with Exact Online in July this year will be exposed to the new onboarding experience. We will measure the success of the new design by tracking engagement, happiness and time to complete basic

product activation. In the long-term, we expect an impact on getting started customer satisfaction (recurring co-create survey).

We expect this project, together with other initiatives, to make customers onboarding more pleasurable and reduce chances of churn during the first six months with our product.

Curious to hear more about the next steps?

Contact someone from the HUX team: Carina Palumbo (UX Designer), Jeffrey Feijen (Product Readiness Specialist), Marco Kastrop (Development Manager), Joline Boschman (Product Marketing).