

All aboard!

The art and science of onboarding.

INTRO

What is it that drives people to seek communities out, but more importantly, what is it that keeps them there?

And that all starts with onboarding.

2. Retention

When we hear the term onboarding we tend to think of the process that someone is led through when they join something for the first time. And that is part of it, but there's way more to it. Onboarding isn't just about acclimatising your members – it is the first (and one of the most important) stages in your retention strategy. Make a mental note of that.

Most of what I'm going to talk to you about in the next 30 or 40 minutes isn't particularly new or groundbreaking – it's stuff that you can look up online if you know what to look for – but I hope to reframe your thinking a little. If you are new to community building, you are having retention problems, or you haven't considered your onboarding process for a while, this talk should give you some pointers.

15 years ago when I was a rookie community builder (and to be fair, it was a very new game back then), onboarding wasn't something that anyone gave much thought to.

Back then the internet wasn't a particularly delightful place – it was all very new and the focus was on function. There was less competition, very few platform options, and a whole lot of confusion. These days things have changed – platforms are intricately tooled and they often ship with built in “onboarding journeys” which make it very easy to assume that the work is done for you and you can move on to writing your content or getting more strategic.

3. UX + Social Science

But successful onboarding is a recipe that combines a well designed and considered user experience with some basic psychological principles. Onboarding is a hybrid of UX and social science. A love child! Everything we do should culminate in *4. architecting an experience that utilises our knowledge of cognition to increase goal conversion*. In this case our goal is to get

someone onto the first rung of the retention ladder by assuring they have a great first experience.

There are two broad aspects to onboarding – you need to onboard people to your *platform* (give them the knowledge they need to use it without feeling overwhelmed) and to your *community* (give them clear paths to find the info they are looking for and help them create connections that will ultimately support retention).

But it's important to remember that all of this depends on the type of community that you're managing. The platform piece is easy – you can logic your way through that if it doesn't have something already built in. But the process required to onboard people to internal communities (which might be your intranet if you work in a distributed workforce, or it could be a school or university platform) will be very different to that of a product support community (which is all about how fast people can find answers), which in turn will be very different to CoPs (where it's about connecting and empowering people by persuading them to take certain actions).

So today's talk is going to be broken down into four parts. The why, the what, the when and the how. In each section we'll talk about the functional steps (which is the bit that you can Google) as well as the psychology, which in my opinion is how you find success. **5 mins**

5. WHY

So let's start with WHY.

At a functional level, onboarding serves a dual purpose. It ensures that your members can figure out how to use the key functions of your technology and it guides them to the information or answers to the question that brought them to you in the first place.

At a psychological level, it gives them guidance around acceptable behaviour and indoctrinates them into your culture. And that is where the magic happens. That right there is the key to retention. It is at that point that you build the foundations of your ongoing strategic engagement. There are lots of other factors that you will need to negotiate down the line, but if you want to hook people in early so that they become a part of your long term sustainable engagement strategy, this is when you do it.

6. "User onboarding is the process of increasing the likelihood that new users become successful when adopting your product." Samuel Hulick (UserOnboard)

So... what does "successful when adopting your product" mean in the world of online communities? I suspect that if I asked that question, most people would respond with something along the lines of "figuring out how to get an answer to a question" – and that's not

wrong, but it's only part of the answer. What we actually want to do is increase the likelihood that new members will become valuable contributors. And what that looks like depends on the individual community and what objective it is tasked with meeting for the business.

Because that is what it all comes down to, right? You shouldn't be designing any part of your community experience without keeping your end goal clearly front of mind. It's not uncommon for community practitioners to be tasked with increasing their engagement stats, and that's often a false economy.

7. Engagement

What is the value of "engagement"? It's a catch phrase (or for many, a trigger word) that without clear definition is pretty much worthless. You need to back up the bus and define very specifically what the value of your community is to the business, and what kind of behaviours you need to encourage in order to meet that value proposition. Once you have that objective, you can design a journey towards that destination. Which starts with onboarding.

We'll take a look at some of those different objectives shortly, but for now we know that they all start with that initial experience. That defines everything.

When we walk into a party or a room full of people for the first time we make a snap judgement about whether it looks like our kinda scene, and we frame our behaviour accordingly. It's the same situation when we first find a new community – that initial experience defines everything that we think from that moment on. You get one chance. Digital marketers know that the first email is key – conversion rates go down from that point on, so think of that first exposure as your big launch and your hail mary combined. Don't screw it up.

8. Expectations

So, how do we make that first impression count? We set expectations, we arm people with tools, we teach them how to use them, and we direct them to relevant knowledge. 3 mins

So that's our what.

9. WHAT

What does onboarding involve? What are the key aspects of a great onboarding journey? Well that depends on a multitude of factors, not the least of which is the type of community that you're running, but there is a general checklist from which we can draw. So let's run through that now.

10. Onboarding

- Helps members familiarise themselves with your platform.

- Provides new members with the tools and information necessary to engage with the community. (Remember that engagement doesn't nec mean posting.)
- Clearly communicates guidelines and cultural expectations.
- Introduces and integrates new members into the community and helps them create their first connections.
- Motivates new members to become involved and active.
- Establishes your organization's relationship with members.
- Helps members connect with individuals or groups that share their values and/or interests.
- Demonstrates the value of your community and convinces members to invest their time.

So how do you know which of these are relevant to your audience? Back in the old days we used to just "spray and pray". We'd give everything a go and see what worked. And there's actually nothing wrong with that approach, because it assumes flexibility and a willingness to experiment, and those are highly commendable traits when it comes to community building. But taking a more structured approach makes it easier to distill solutions from those experiments.

11. Primary focus

And this is where the second 'what' comes in. What is it that you want your members to primarily focus on in order to get the most value out of their experience? Remembering that you only get one chance to get this right and you don't want to overwhelm people.

So I recommend having a primary focus that you design your journey around. There are a few different options here.

12. Focuses

1. Benefit-focused approach: which outlines the primary benefit for members and shows them how to achieve that. E.g. finding other people with similar interests to share ideas with.
2. Function-focused approach: which explains the core functions of the platform and how to use them. E.g. how to set up and market an event.
3. Doing-focused approach: which walks members through the golden paths (or the most common actions). E.g. how to search a knowledge base or post a new question.

There is a fourth approach that some people recommend (and it tends to be commonly used) but I think it's the weakest approach, for reasons that we'll talk about later. I'm talking about the

4. Account-focused approach: which guides members straight to profile creation. E.g. completing a profile card and uploading a photo.

This used to be a popular approach because there was a misguided belief that it would make people feel more connected or invested, but I have never seen any evidence of that. I would spend that time on achieving a much more focused goal.

13. Regardless of which approach you choose, all onboarding journeys should have the following characteristics:

- Quickly establish why someone came to your community and show them how to achieve that goal
- Provide a clear, simple workflow that isn't overwhelming
- Ensure people know where to find guidelines and get help if they get stuck
- Provide a satisfying experience (because THAT is what people will remember)

Hopefully you've noticed how concise that list is. And I can probably make it even shorter.

14. Main focus

Make it as easy as possible for people to interact with the community for the reason they came to it in the first place.

If you are going to take away one thing from this talk, this is it. If you're going to tweet one slide, this is it. If I was going to do a 5 second talk on onboarding – this is it. Make it as easy as possible for people to interact with the community for the reason they came to it in the first place.

Everything else can come later. And that brings us conveniently to the when. 6 mins

15. WHEN

When do we onboard?

The answer to this is pretty obvious – straight away, right? Well yes... and no. We *start* onboarding straight away, but at that time we only execute that very distilled down process that we just defined. We make it as easy as possible for people to do that thing they came to do. And then we stop... for now.

Too many communities (in fact, I'd go so far as to say *most* communities) try to take newcomers through onboarding journeys at the exact moment that they are least receptive to them. That's not in the spirit of onboarding. It is not intended to help the user reach their goal fast, it is geared towards giving us the information that we think we need in order to target them in our engagement strategy later on.

If I walk into a shop to grab milk on the way home from the gym, I don't need a guided tour of the shop, or to know where the fire escapes are, or to give them my address so they can let me know when milk is on sale in the future, or what other things they sell in the shop that might

interest me later. I just want the milk. Chances are pretty high that I've been in similar shops before, so I know what else they sell. Even if that shop owner thinks that their shop is slightly better than all the other shops that sell milk, I still just want to get out and get home to make my coffee.

It's the same in our communities. Most of the time, newcomers only care about solving a problem. Everything that comes between them and finding that solution is frustrating. They'll accept your TOS and click through your wizard without reading, just to get to that solution. You're wasting their time (and yours) with extraneous information at this point. They don't care about meeting other people that asked a similar question right now. Just get them to the end goal fast.

If you make it easy to do that, they'll recall the experience with pleasure and they'll come back later. *That's* when you hit them with your next steps.

Good onboarding journeys begin *after* the visitor has asked their first question. If your users aren't completing their onboarding, you probably hit them with it at the wrong time, or expected too much all at once.

16. Long game.

So we need to start thinking about onboarding as a longer game than we first thought. We've just established when it starts, but when does it finish?

We've directed the new joiner to achieve that first goal, and we know that now is the time to hit them with the next step. Now is our opportunity to start to lead them through a defined journey, designed to orientate them within the wider community. That might mean walking them through a defined list of tasks to onboard them onto your tech, or encouraging them to self-disclose, or it might mean introducing them to other members. Whatever it is, they shouldn't need to do it all at once.

Ideally, you'll give them a choice as to which of those things is the most important to *them*. We want to teach, but we don't want to remove autonomy.

We learned this lesson at Discourse. When we first launched, we knew that it was a very different experience to that provided by the existing legacy platforms. It looked different, it acted different, and it was built using very different technology. That was confusing for people, and sometimes frustrating because they couldn't work out how to undertake basic functions.

We decided to introduce a welcome bot (we call it DiscoBot) that walks a new user through the fundamentals of using Discourse. We tried to include as much flexibility as we could. We allow community managers to customise the bot so that it's on brand or to turn it off altogether. That worked well for a while, until we started to gain real market traction. Now almost everyone has experienced a Discourse forum in some way, shape or form, so going through that bot journey yet again is just a waste of time. We had to introduce a one click way to say "I've done this before, elsewhere." We had to give people back their autonomy.

A common misconception around onboarding is that it all takes place at the start. But onboarding doesn't stop at the first visit. Or the second. Or maybe ever. Bearing in mind that this

is part of your retention strategy, anything you do to increase the likelihood of someone staying on is part of the onboarding journey.

We used to think that it started with registration, but that's misguided. Sure, people generally need to register in order to use the community, but that's not onboarding, that's joining. Make that step super simple. In the same way that you don't need to get someone to fill out a complicated profile form, you also don't need to collect much data from them when they register. You need two things – a way to identify them (username) and a way to contact them (email address). That's it. The rest can come later.

If people aren't filling out their entire profile on their very first visit, that's probably because you threw that hurdle in front of them while they were trying to achieve that first goal. Social science has taught us that people need to be intrinsically motivated to demonstrate a behaviour that isn't fulfilling a basic need. What's in it for them? If you want people to fill out that form, you need to very clearly demonstrate to them what immediate benefit they will get from doing so.

There is no such thing as doing things for the greater good when people are time poor.

You're asking people to make a big sacrifice. If you ask them to do that on day one, you're asking for a long term commitment. They just found you via Google and wanted to get an answer to a quick question. They didn't intend to sign up to become a tool in your engagement strategy – they don't care if you have a growth or engagement KPI. To be frank, they probably don't even know that you exist! They have their own problem to solve and you're making it hard for them. You need to lessen their cognitive load by removing extraneous steps.

17. Isn't about you.

That may mean that you need to reframe your thinking because this isn't about you, it's about them.

What if you scrapped your onboarding checklist altogether and provided just in time messaging when people are already interacting?

18. JIT message

A bit like this one – rather than forcing someone to sign up in order to find an answer to their problem, what if we gave them the answer and then motivated them to sign up a bit later on? What if we explained the benefits at a time when they're already starting to see the value?

If people aren't doing what you want them to do, you either need to find a new way to motivate or persuade them, or you need to scrap the process and try something new.

But that's part of the how. 7 mins

19. HOW

How do you design your onboarding purposefully so that it aligns with your goals? First of all, you define what those goals are.

20. Goals

If you are managing a support community and your goal is to deflect support tickets, your onboarding process should be laser focused on getting that new member to the information that they need to get unstuck as fast as possible. That is probably some combination of helping them search your knowledge base and posting a question. Don't assume they need anything else before that point. That's your step one.

If you are managing an education community and your goal is to support members to learn with minimal interference from teachers, your onboarding should be geared toward helping them find their cohort or sharing a challenge. That's your step one.

If you are managing a community of practice and your goal is to help foster peer to peer networking, your first step might be to collect the information required to connect them with a like minded member or group. That's your step one.

You want to create a valuable experience for your members by only delivering them content that is directly relevant to their interests, while at the same time learning about their challenges so that you can figure out the best way to continue to support and engage them.

Regardless of the type of community, you need to define a very clear objective. What do you want to become their regular habit? Once you have that, you can build your user journey around it.

21. Example

Let's look at an example of a simple process. It's just 5 steps.

1. First you encourage immediate engagement aligned with your primary objective (the things we've just talked about)
2. Then you introduce what's called a baby step task (tech onboarding)
3. Peer connection (respond to a PM)
4. Next baby step task (customise their feed)
5. Group connection (direct them to the off topic/fun area)

As people progress through the steps, they are becoming more emotionally connected to your community. Plan the steps carefully so that each one adds value to their experience and gets them closer to attaining their goal and make sure you encourage each new behavior. Don't waste valuable attention with unnecessary requirements like updating a profile photo or posting a welcome topic unless you can clearly tie those requirements to a secondary objective.

Secondary objectives generally align with creating a feeling of empowerment, connection or autonomy. That may be through education (providing an ongoing source of constantly updating

information that is relevant to them), or it may be through creating opportunities (giving them a chance to showcase their own skills) or it may be through connection (helping them find peers).

Plan these steps carefully, monitor their efficacy and be prepared to change them up.

The key to success is finding a way to introduce members to these benefits on a large scale *and* in a personalised way. It can be tricky to find that balance. Good community platforms will provide you with automation tools and those can be extremely useful for doing some of the heavy lifting, but no one wants to feel like a number.

So do you go personal? Or software first? Let's talk a bit about both approaches.

22. Software first.

Automation tools are powerful. They allow you to plot out your journey and execute your steps en masse, without it being a huge time suck. They also allow you to reach a wide audience quickly, which provides you with a great source of data.

We recently built a plugin called Discourse-automation which works by combining triggers and actions. A trigger might be "when a user has viewed two topics" or "when a user has read the TOS" and an action might be "send a PM" or "promote up a trust level".

This flexibility affords you the freedom to build out multiple onboarding journeys that are customised based on individual actions. That removes the necessity to make assumptions about what your members are doing and therefore what they need to know next. Other platforms probably have similar tools.

Other examples of software first approaches include the welcoming DiscoBot that I talked about earlier, or the kind of email onboarding journeys that you can build with products like MailChimp. Those can be really powerful when it comes to motivating members to re engage.

23. There are also checklist or progression indicators like this example from FeverBee,

24. or this one from Pinside.

Both of these take a different approach toward collecting the information they think is important. This pinside one isn't taking the right approach as far as steps are concerned, but you get the idea.

The other benefit is that people have a visual reminder of where they are at in the process. It can motivate people to get finished in the same way that notification badges on our phones trigger us. Most people don't like a constant reminder that they haven't finished something that might be important.

The key to using these tools effectively is to get the steps right and nail your motivations.

25. The personal approach.

Now let's talk about taking a more personal approach. In my experience this is significantly more successful but considerably more work. That means that it's not scalable for large communities, but that's probably ok because they tend to be product support communities where hand holding isn't necessary. Those communities have high turnover rates which makes sense. If someone has to keep coming back to your product support community then you should probably be looking at creating better documentation or a more robust product.

There are degrees of personalisation. At one end of the spectrum you have individually crafted emails and messages, and at the other you have mail merge type setups. The first is highly time intensive and requires commitment. You can't start a personal interaction if you're not prepared to put in the time required to close.

A few years ago I started a CoP for UXers. We had a strongly connected core audience that were highly engaged in our social media channels and content marketing funnel. I started out with a PM to every new member. Over several months I iterated on my content until I hit a sweet spot and was getting almost a 70% response rate.

The concept of the community was helping new UXers to get into the industry and the first step in the journey was directing them to a resource post which answered most of the initial questions that people searched for when they landed on our site. (I got that data from GA.) They were so grateful for that support that they were responding asking what they could do in return. I would encourage them to write what we called their UX story – a paragraph describing how they found UX as a career option, where they came from and what their next step was going to be. I did this because the reader surveys that we'd been sending to our blog subscribers taught us that that was the biggest challenge people were facing – they wanted to know how others in their situation moved their career forward.

Hopefully you're noticing that each of these steps was grounded in research and data, not assumption.

It quickly became apparent to me that this was a highly successful approach, but not one that was scalable. I would have to have spent half my time responding to these newcomers, which doesn't leave much room for being strategic about other aspects of building the community. So I recruited a volunteer who was primarily tasked with that job.

At FeverBee I tried a similar approach.

26. PM

I would send this individual PM to every new member. The *format* that it refers to is a topic asking people what they are currently working on. I learned through trial and error that that was what most people wanted to talk about. It worked on two levels – they were curious to know what other people were doing (maybe they should try it too?) and they also wanted to talk about what they were doing. People love talking about themselves. 9 mins

This process was the culmination of a number of experiments and was also very successful.

27. Quote As you can see from this response, it got people to take action *immediately* which is the key. Later never comes.

I initially started out by personally researching every person that signed up and sending a PM that asked them something specific about themselves. That was extremely labour intensive and didn't return better results than the example I just showed, which was a much more streamlined process. The key seems to be using the words "personal note" and being ready to respond quickly if they answered.

This approach works really well for small or new communities and is a great tool for building engagement and connections between early members. I was able to use the information that they gave me in response to help plan the next steps in their journey.

So using this personal approach you can start to group members together and craft bespoke onboarding journeys. You can either use data gathered during this early personal engagement step, or by using your search data (either native to your platform or from GA) to find out what people came to the community looking for. You could have one journey for people that were looking for resources, another for people that are looking for connection, etc. Then you tailor future messaging accordingly.

If you have a small community or enough staff or volunteers to make a personal approach feasible, the key to success is writing persuasive copy.

28. Persuasive copy

We won't go into that in too much detail because you can look it up, but I would definitely recommend doing that. You need to craft messaging that is short, direct and with the sole purpose of getting people to make a contribution *right now*. That's the first onboarding step, remember? Anything else will be ignored at this point. Once they make that contribution, your notification system will kick in and take over, assuming that first contact was onsite, as opposed to an email onboarding flow.

29. Email onboarding flows

Speaking of which, let's briefly touch on email onboarding flows, because they are a great example of a hybrid approach to the personal vs automated challenge. I have used them with reasonable success in the past, but they do require careful consideration and refinement.

Email flows require either a platform that has the tooling built in, or some form of integration with MailChimp or similar. They involve a series of emails (usually 4) that are staged over a set timeframe (generally one per week for a month). Each is designed to encourage one specific action which should align with a step in your onboarding journey.

The first step might be a welcome email which nudges people to share a challenge in the "What are you working on" topic that I discussed earlier. You might then follow up a week later with a second email that shares some free resources. You encourage people to open your future emails by only providing concise, helpful information – no marketing speak.

The third email might describe your culture. What is it that makes your community different from the others, and therefore more valuable to your members? Use it to describe the types of interactions that you want to see.

The last email should be geared at value reinforcement. Use it to demonstrate practical steps that members can take to improve their skills (or whatever the purpose of your community is) and guide them to a targeted discussion.

Each email should use persuasive language which is pitched specifically at your audience. Think about what their values are and appeal to those. In some audiences, new members feel daunted by intelligence or complicated language, in others, people want to showcase their knowledge and achievements. What will work best for your audience?

Make sure each email only contains one simple CTA. You want to make things very, very easy for people. If you overwhelm them with words and links they'll scan it and decide to leave it for later, but later will never come.

And don't be afraid to change and refine as you go.

Wow – that was a lot of talking about I'm running out of time so let's look at a quick summary of **Dos and Don'ts** before we wrap up for questions.

DO

- Make it as easy as possible for people to interact with the community for the reason they came to it in the first place.
- Have a clear user journey with well defined steps.
- Keep your steps simple. Each step should only solicit one clear action.
- Monitor your stats to see what works and what doesn't.

- Be prepared to change things up if they're not working.
- Talk to your members frequently to solicit feedback.
- Retest (reboard) at least once per year.

DON'T

- Use generic intro topics.
- Hit people with all your steps the moment they join.
- Remove people's autonomy.
- Design based on assumptions.
- Ever stop testing and refining.