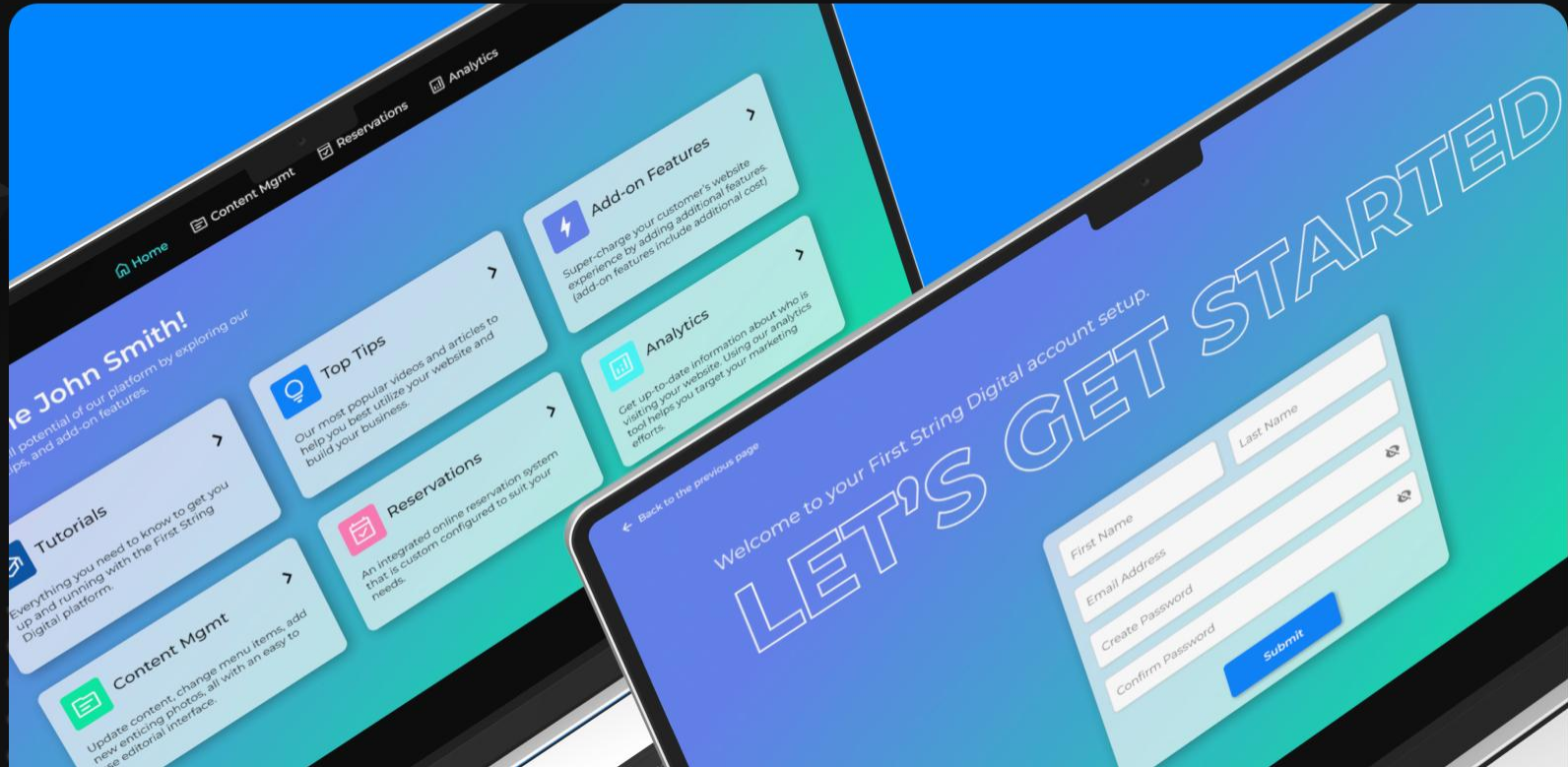


First String Digital

Sign Up Process



Project Summary

Product Design & Frontend Development (2020)

In response to the existing inefficiencies in their SaaS subscription product's onboarding process, First String Digital recognized the imperative need for a comprehensive redesign. This endeavor aimed to streamline the onboarding experience, leading to a significant increase in efficiency and a notable decrease in the signup drop-off rate.

Responsibilities

- User Research
- User Journey Map
- Pain Points
- Personas
- User Flow Diagram
- UI Wireframe & High-Fidelity Design
- Frontend Development

Discovery Phase



Problem:

Need to streamline the subscription process for new clients due to delays caused by relying on direct email or phone calls for onboarding.

Solution:

Design and develop a digital sign-up process that allows new clients to input their business information prior to the consultation call.

Frustrations & Pain Points

Through research, interviews, and data gathering, three recurring frustrations and pain points in the onboarding process faced by both clients and team members were identified and prioritized.

Overwhelmed Clients: Undefined expectations and requirements before consultation calls caused overwhelmed clients.

Information Gathering: Lack of basic information prior to consultation calls caused delays in the onboarding process.

Payment Process: Subscription payment manual setup process resulted in logistical difficulties and delays.

Personas

To effectively support clients, we also needed to support the consultation representative assigned to their website project. By synthesizing data from research and discovery, we identified two persona types to guide the user's journey and design strategy.

Persona – Richard



Name: Richard

Age: 45

Occupation: Restaurant Owner

Background:

Richard is a seasoned restaurant owner with a wealth of experience in the industry. He has successfully managed his bustling restaurant for over a decade, earning a reputation for his delicious cuisine and warm hospitality. Despite his passion for the restaurant business, Richard's daily responsibilities leave him with little time to focus on establishing an online presence for his restaurant.

User Story:

Richard is actively searching for an easy-to-use website builder or service tailored to restaurants. He needs a solution that allows him to swiftly establish an online presence for his restaurant without dedicating extensive time or effort, all while ensuring a hassle-free experience. Richard is willing to invest in a cost-effective solution and values customer support for assistance when needed.

Persona – Richard

Goals and Needs:

- **Hassle-Free Website Setup:** Richard recognizes the importance of having a restaurant website. He needs a fast, straightforward, and hassle-free solution to create a website for his restaurant without the need for extensive time and effort.
- **Minimal Workload:** Richard's schedule is demanding, and he cannot afford to spend too much time managing a website. He is seeking a hands-off solution that practically takes care of itself, allowing him to focus on running his restaurant seamlessly.
- **Online Visibility:** Richard wants to increase his restaurant's visibility online and attract new customers. He hopes the website will serve as a tool for showcasing his restaurant.

Pain Points:

- **Time Constraints:** Richard's restaurant occupies most of his day, leaving him with limited time for other tasks, including website management.
- **Limited Technical Skills:** While he possesses basic computer skills, Richard is not proficient in web development or design.
- **Budget Conscious:** Richard is cost-conscious and is looking for an affordable website solution that won't strain his restaurant's finances.

Attitudes and Preferences:

- Richard values simplicity and efficiency in all aspects of his life, especially when it comes to technology solutions.
- He prefers to work with user-friendly platforms and services that require minimal technical expertise.
- Richard is open to adopting new technology as long as it doesn't add to his already demanding workload.

Persona – Chloe



Name: Chloe

Age: 23

Occupation: Consultation Representative

Background:

Chloe is a dedicated consultation representative working for First String Digital. Her role involves guiding potential clients through the onboarding process and ensuring they have a smooth experience. She takes pride in providing excellent customer service, but she faces challenges due to the current onboarding process.

User Story:

Chloe is actively seeking an improved onboarding process that collects essential business information from clients before their consultation calls. She believes that this proactive approach will reduce delays and frustrations, allowing her to provide better customer service. Chloe is open to implementing a system or software that streamlines this process, making her work more efficient and satisfying for clients.

Persona – Chloe

Goals and Needs:

- Streamlined Onboarding: Chloe's primary goal is to facilitate a smooth and efficient onboarding process for new clients. She wants to minimize delays and frustrations by having essential business information collected before the consultation call.
- Improved Client Experience: Chloe aims to enhance the overall experience for clients like Richard. She wants them to feel that the sign-up process is straightforward and tailored to their needs.
- Time Efficiency: Chloe is looking for a more time-efficient approach to her work. The current manual process of gathering business information during the consultation calls is cumbersome and can lead to longer call durations.

Pain Points:

- Lack of Basic Information: Chloe often encounters clients who are not adequately prepared for the consultation calls, as the current process does not gather basic business information beforehand.
- Manual Data Entry: Collecting business information during the consultation calls requires Chloe to perform manual data entry tasks, which can be error-prone and time-consuming.
- Client Frustration: Clients can become frustrated when they are asked to provide essential business details during the consultation call, as they may not have this information readily available.

Attitudes and Preferences:

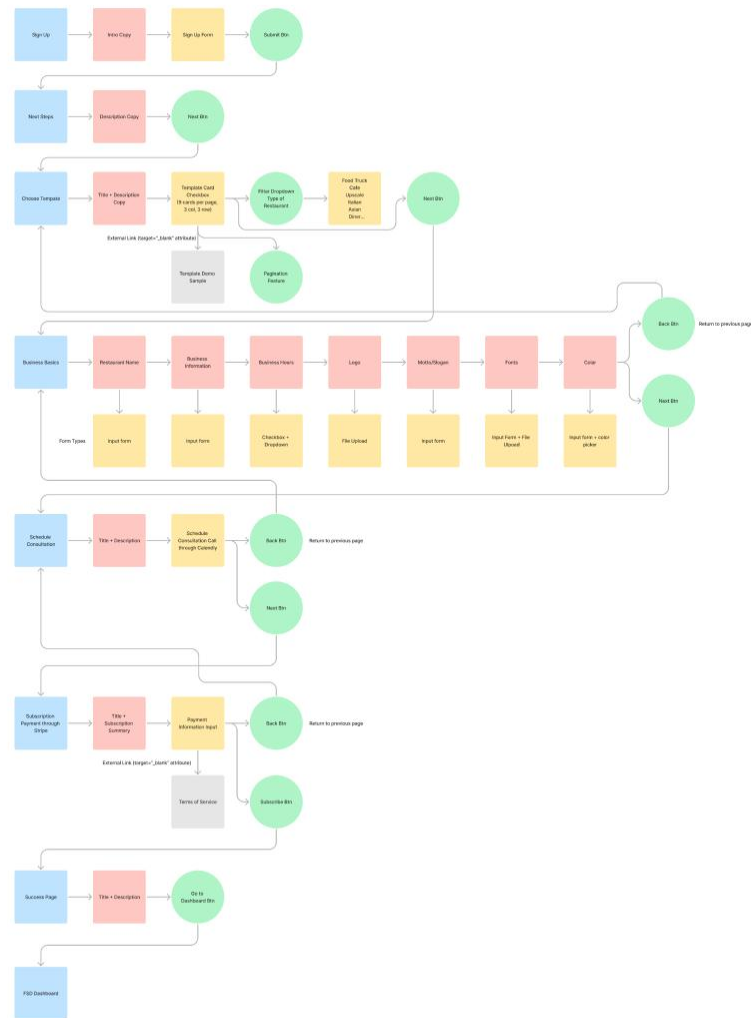
- Chloe values efficiency and professionalism in her work. She wants to deliver a high-quality service to clients while minimizing administrative tasks.
- She prefers a solution that automates the collection of business information, making the onboarding process smoother for both her and the clients.
- Chloe is open to adopting technology and software tools that can improve her workflow and enhance the client experience.

Definition, Design, & Develop Phase



User Flow Diagram

Our solution created a direct and simple path.
Our user flow and design provided a streamlined and efficient user experience, reducing confusion and delays by offering clear instructions and manageable tasks.



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Welcome to your First String Digital account setup.

LET'S GET STARTED

<input type="text"/>	<input type="text"/>
<input type="text"/>	
<input type="password"/>	<input type="password"/>
<input type="button" value="Submit"/>	

YOUR ACCOUNT HAS BEEN CREATED

Now, we would like to learn more about your restaurant. Set up your restaurant profile by responding a few questions, which should take you about 5 minutes to complete.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Account	Choose a Website Template	Business Basics	Schedule Consult Call	Subscription Payment
	<input type="button" value="Next"/>			

FS 1 Create Account 2 Choose a Website Template 3 Business Basics 4 Schedule Consult Call 5 Subscription Payment

CHOOSE A WEBSITE TEMPLATE

Select 3 Of Your Favorite Template

Our representative will help you narrow down your choice to the one that will best represent your business brand and goals.

[Filter](#)

Tuscany - Elegant & Minimal

Live Demo

Tuscany - Elegant & Minimal

Live Demo

Tuscany - Elegant & Minimal

Live Demo

Tuscany - Elegant & Minimal

Live Demo

Tuscany - Elegant & Minimal

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Live Demo

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Live Demo

Tuscany - Elegant & Minimal

Live Demo

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BUSINESS BASICS

Restaurant Name
Provide the name of your restaurant.

Business Information
Provide more information about your business.

Business Hours
Select the days of the week, and hours of your business operation.

Logo
Upload your restaurant logo. Recommended files are .png, .jpeg, or .jpg (optional).

Motto or Slogan
Provide a motto or slogan (optional).

Font
Provide the name of the font(s) your business uses, and for respective font files with the correct font weights (optional).

Color
Provide your business brand primary. Either input the HEX, RGB, or select a color with the color wheel (optional).

Restaurant Name

Type of Restaurant

Screen Address

City State Zip Code

Website URL (optional)

Instagram URL (optional)

Facebook URL (optional)

Twitter URL (optional)

Other Social Media Network URL (optional)

Business Email Address

Business Telephone Number

Type of Cuisine

Restaurant Description

Monday From To [Set Service](#)

Tuesday From To [Set Service](#)

Wednesday From To [Set Service](#)

Thursday From To [Set Service](#)

Friday From To [Set Service](#)

Saturday From To [Set Service](#)

Sunday From To [Set Service](#)

Logo
 [Browse F&S](#)

Motto or Slogan

Font
 [Browse F&S](#)

Color
 [Browse Color](#)

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SCHEDULE CONSULTATION CALL

Consultation Call

In this call we will review the information you provided, and ask for additional content we will need to complete your business website.

After the consult call has been scheduled, you will receive a calendar invite for this call in the email you provided during the sign up process.

🕒 Duration: 30 minutes
👤 Consultant: Mike Smith

Select a Date & Time

January 2020 < > Wednesday, January 15

SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

📍 Pacific Time - US & Canada (PST/PT) -

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SUBSCRIPTION PAYMENT

You are subscribing to the Entree annual subscription

\$1,068.00 per year

Enjoy a fully functional website for your food service business! Featuring online reservation, full HTML menu, site updates, an easy to use CMS, and more!

Subscribe

By confirming your subscription, you allow First String Digital to charge your card for this payment and future payments in accordance with our [Terms of Service Agreement](#).

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THANK YOU FOR SUBSCRIBING!

To ensure that you get the most out of your website subscription services, we recommend that you take the time to explore First String Digital's dashboard platform. There you can take advantage of our easy to follow tutorials to guide you through some of our basic dashboard features.

During the call with our Client Support Consultant, we will gather some more basic requirements, walk you through our dashboard, and schedule with you the date and time of your business website launch.

[Go To FSD Dashboard](#)

FS Home Content Mgmt Reservations Analytics 🔔 👤

Welcome John Smith!

Discover the full potential of our platform by exploring our tutorials, top tips, and add-on features.

- Tutorials** ➤
Everything you need to know to get you up and running with the First String Digital platform.
- Top Tips** ➤
Our most popular videos and articles to help you best utilize your website and build your business.
- Add-on Features** ➤
Super-charge your customer's website experience by adding additional features. (add-on features include additional cost)
- Content Mgmt** ➤
Update content, change menu items, add new enticing photos, all with an easy to use editorial interface.
- Reservations** ➤
An integrated online reservation system that is custom configured to suit your needs.
- Analytics** ➤
Get up-to-date information about who is visiting your website. Using our analytics tool helps you target your marketing efforts.

Project Launch

Transformed an ineffective process into a successful solution

- Significant decrease in drop-off rates during the onboarding process from 35% to less than 20%.
- The process was tested and refined, ensuring that only the necessary information was gathered, allowing for more meaningful consultation.
- Future steps include further refinement through client interviews, with the goal of reducing the drop-off rate to below 10%.



Challenges

Coordinating Interviews with Restaurant Owners: We implemented a flexible approach by offering online video chats for some owners and face-to-face interviews with others. This allowed us to gather valuable insights and feedback from a diverse range of clients.

Refining Wireframe Design Prototypes: Involved iterating through multiple wireframe design prototypes to refine the onboarding user-flow process. Through continuous testing and feedback, we eventually achieved a user-friendly and efficient onboarding experience for our clients.

Juggling Multiple Roles (Designer and Developer): Balancing the dual roles of designer and developer while adhering to a strict 3-month deadline was undeniably demanding. However, by effectively prioritizing tasks and maintaining a clear project roadmap, I successfully navigated the challenges. This allowed us to not only meet the deadline but also create a feature that significantly enhances First String Digital's SaaS product.

Learnings

Focus on User-Flow and User Research: I learned the importance of prioritizing user-flow and user research over UI design. Understanding and addressing user needs and preferences was paramount in creating a successful feature. This shift in focus resulted in a more user-centered approach that improved the overall product.

Prioritize Tasks as a Product Designer and Frontend Developer: Balancing my dual role as a Product Manager and a Frontend developer required effective task prioritization. I discovered the significance of allocating my time and efforts efficiently, ensuring that critical project elements received the attention they deserved. This approach helped maintain project momentum and quality.

Align Business Goals with User Experience: I gained insights into the importance of aligning our project's objectives with broader business goals while still keeping a strong focus on user experience. This balance ensured that our efforts contributed to the company's success without compromising the quality of the user experience, ultimately leading to a more impactful feature outcome.

Thank You!

Get In Touch

✉ Email: steve@stevekim.io

☎ Phone: +52 624-224-4028

🌐 Website: <https://stevekim.io>