

SaaS Onboarding Checklist

2026 edition - from Flowjam (flowjam.com)

Goal: get a new user to first value in under 5 minutes. Target activation 40-60% (average is ~37.5%).

Before you build

- [] Define ONE activation event - a specific observable action, not 'completed onboarding' (e.g. 'created and shared one project', 'closed one ticket with the AI agent')
- [] Instrument it: track signup to activation event, and time-to-value (TTV)
- [] Segment paths by signup signal: role, company size, integration intent, stated use case

Phase 1 - Orient (0-60 seconds)

- [] Welcome screen: one line on what they will achieve
- [] Role / intent selection (drives the segmented path)
- [] Set expectations: how long, what they will have at the end
- [] Optional: a 30-60s welcome/demo video showing the 'after' state

Phase 2 - Activate (1-5 minutes)

- [] Interactive walkthrough (not a passive tour) to the first value moment
- [] Remove every non-essential field/step before the aha
- [] Pre-fill / use sample data so they hit value without setup friction
- [] User completes the ONE meaningful action = activation

Phase 3 - Reinforce (5 minutes - 7 days)

- [] Visible in-app checklist: 4-6 steps between signup and full activation
- [] Contextual tooltips at the moment of need (not upfront)
- [] Behavioral trigger emails (based on what they did/didn't do), not Day 1/3/7 drips
- [] Nudge stalled users with an interactive demo of the step they skipped

Metric targets

- [] Time-to-value: under 5 minutes (best-in-class); under 24h at minimum
- [] Activation rate: 40-60% (average is ~37.5%)
- [] Tour/checklist completion: beat the ~15% generic-tour median with segmented paths
- [] First value within 14 days -> aim for 80%+ month-12 retention