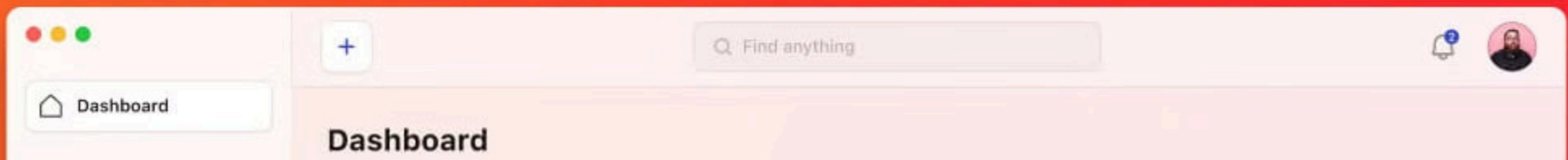


WELCOME :)



Quickstart SaaS Onboarding Toolkit

How to Use This Toolkit

Start with the Quick-Start Flow Template to map out your basic onboarding journey. Then use each section to enhance and optimize your flow. You don't need to implement everything at once – pick the most relevant sections for your current stage.

1. Onboarding Flow Builder Template 🚀

How to Use

Map out your essential onboarding steps using this template. Focus on getting users to their "aha moment" as quickly as possible. Replace the example text with your own product's specific actions and messages.

Quick-Start Flow Template

- **Welcome Message:** "Welcome to [Product]! Create your first [core feature] in 2 minutes"
- **First Action:** "Click the '+ New' button to create your first [core feature]"
- **Success Message:** "🎉 Awesome! You've created your first [core feature]"
- **Next Steps:** "Now invite your team to collaborate"

Example messages for a social media scheduler:

📄 Welcome: "Welcome to PostMaster! Schedule your first post in 2 minutes"

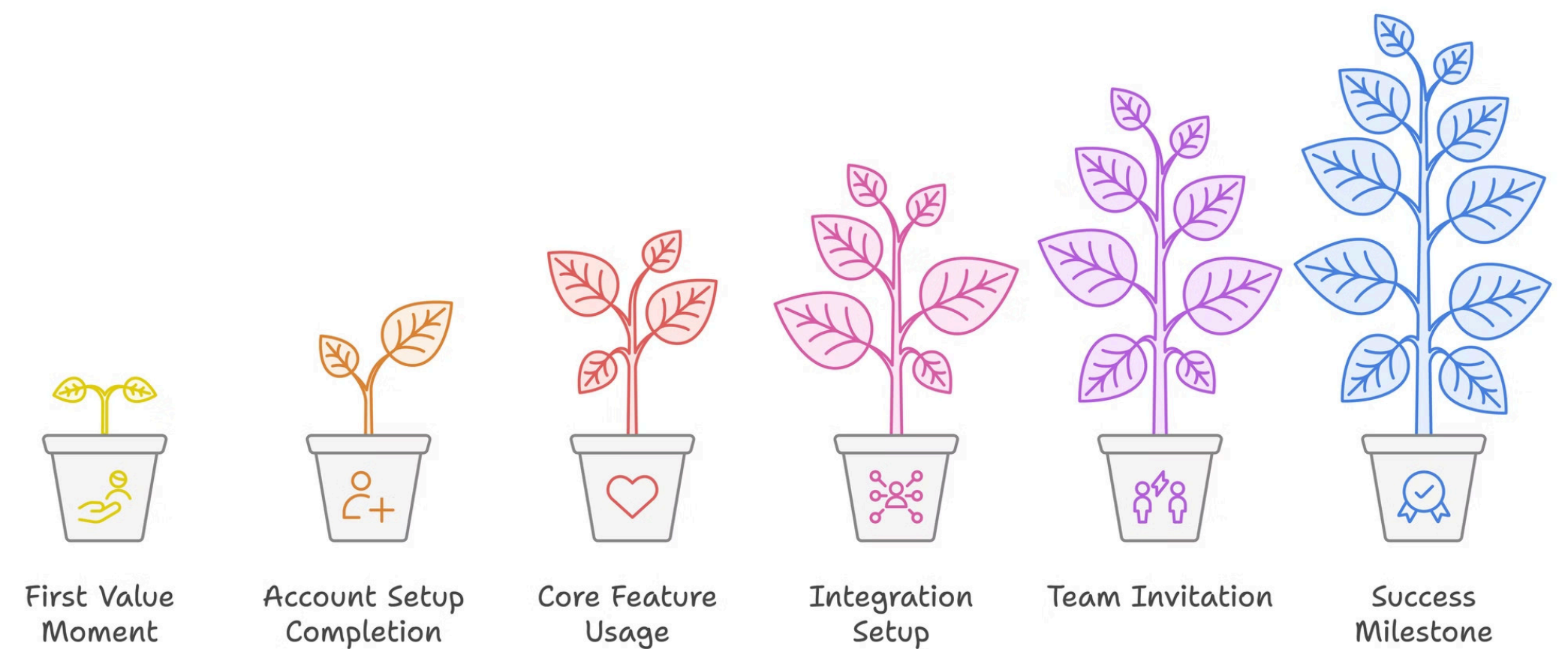
📄 Success: "Amazing! Your first post is scheduled"

📄 First Action: "Click '+ New Post' to create your first scheduled post"

📄 Success: "Amazing! Your first post is scheduled"

Key Moments

Use this to identify and optimize crucial touchpoints in your user's journey.



2. Copy Templates ✨

Customize these templates for your product's voice. Focus on clarity first, personality second. Each template follows a simple formula: Action + Benefit + Next Step.

Welcome Emails

- Subject: Welcome to [Product] - Here's your 2-minute setup guide

Hi [Name],

Excited to help you [main benefit]! Here's exactly what you need to do next:

 - [First action] (2 mins) Example: Connect your first social account
 - [Second action] (1 min) Example: Create your first post template
 - [Third action] (1 min) Example: Schedule your first post

Pro tip: Most successful users complete setup in under 5 minutes!

Need help? Reply directly to this email.

Best, [Your name]

Success Messages

- You're crushing it! You've just [completed action]

Next up: [clear next step] to [specific benefit]

Example: You're crushing it! You've just scheduled your first post

Next up: Create a template to save 3 hours every week

3. Measurement Framework

How to Use

Copy this framework into your analytics tool of choice (PostHog, Mixpanel, etc.). Start tracking these metrics from day one – they'll help you identify where users get stuck.

Key Metrics to Track

1. Time to First Value: ____ minutes
Example: Time to first scheduled post
2. Activation Rate: ____%
Example: % of users who schedule 3+ posts in week 1
3. Day 1 Retention: ____%
Example: % of users who return within 24 hours
4. Day 7 Retention: ____%
Example: % of users who schedule posts in week 2
5. Feature Adoption Rate: ____%
Example: % of users using templates

-  Time to First Value
-  Activation Rate
-  Day 1 Retention
-  Day 7 Retention
-  Feature Adoption Rate

4. Tools to use

Start with just one tool from each category. Don't over-engineer – you can add more as you grow. These recommendations work well for indie founders on a budget.

Must-Have Stack

Analytics:

- Recommended: PostHog (open source)
- Setup time: 30 mins
- Key features: User tracking, funnels
- Quick start: Add tracking code to your main user actions

Email:

- Recommended: Userlist
- Setup time: 45 mins
- Key features: Behavior-based emails
- Quick start: Set up these 3 essential emails:
 - Welcome + First Action
 - Success Celebration
 - Inactivity Recovery

5. Testing Protocol

Run one test at a time for at least 2 weeks or 100 users (whichever comes first). Use this simple framework to track results.

A/B Test Ideas

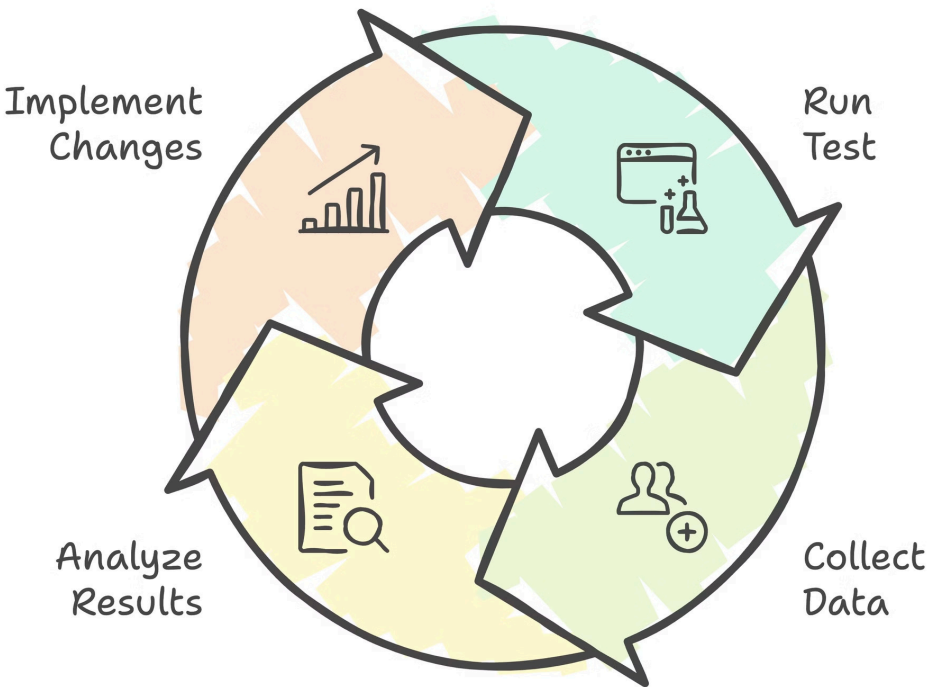
Welcome Message Variations Example:

- A: "Create your first post in 2 minutes"
- B: "Join 10,000+ creators saving 5 hours per week"

First Action Options Example:

- A: Start with social account connection
- B: Start with creating first post

A/B Testing Cycle for User Engagement



Test Tracking Template

Test Name	Welcome Message
Test Hypothesis	Focusing on time saved will increase activation
Variant A	"Create your first post in 2 minutes"
Variant B	"Save 5 hours on social media this week"
Success Metric	% completing first post
Duration	2 weeks or 100 users per variant
Results	Variant B increased activation by 23%

6. Troubleshooting Guide

Monitor these common drop-off points daily. When you spot a trend, use the quick fixes to address it immediately.

Common Drop-off Points & Solutions

Sign-up form

- **Quick Fix:** Remove optional fields
- **Example:** Only ask for email and password initially

First action

- **Quick Fix:** Add progress indicator
- **Example:** "Step 1 of 3: Connect your first account"

7. ROI Calculator

How to Use

Input your numbers to justify investments in onboarding improvements. Focus on metrics that directly impact revenue.

Value Metrics Example

	Before Onboarding Improvements	After Onboarding Improvements
Activation rate	25%	40%
Users per month	100	100
Revenue per user	\$50	\$50
Monthly revenue	\$1,250	\$2,000

ROI = \$750 monthly increase

Ready to implement this toolkit?

1. Copy the Quick-Start Flow Template
2. Customize it for your product
3. Set up PostHog for analytics
4. Create your welcome email
5. Track your first week of metrics

Pro tip: Start with just the Quick-Start Flow Template and Welcome Email. Get those working well before adding more complexity.

Remember: Keep it simple, focus on value, and always optimize based on user feedback. The best onboarding is the one that actually gets implemented!