

Your B2B SaaS Onboarding Checklist

We've had the pleasure of reviewing the onboarding experience of 100s of B2B SaaS products.

What started as a 'short' checklist quickly snowballed into this 88-point PDF of questions on our minds as we review any website, signup flow, first run experience, product adoption, and welcome email.

A lot of these tips might sound obvious

The challenge for a founder or product owner is that you cannot read the label from inside the jar.

Having reviewed hundreds of B2B SaaS product onboarding experiences, we created an 88-point checklist of key questions we consider during the First Run Experience, website review, signup flow, product adoption, and welcome emails.

As the founder or product owner, it's hard to be objective about your own product's onboarding.

As Jan, Head of Growth at Satismeter, says...

“Now I see I have my own dark areas or different kinds of observation skills. It’s interesting because some things TPO highlighted are obvious but I didn’t ever change them. I pushed some of my least favorite areas/responsibilities to the bottom of my list. And so I stopped actively looking at it with fresh eyes.”

Take a fresh look at your onboarding and run through the list today

Website

Landing Page or Home Page

- ☐ Is there a clear value proposition that alludes to the outcome (not the product features)?
- ☐ Is it clear who the product is for?
- ☐ Does the copy allude to the pain points of the customers? Is there social proof above the fold?
- ☐ Is additional social proof shared throughout the page or just at the bottom?
- ☐ Are there multiple CTA's on the home page?
- ☐ Are the CTA's consistent throughout the page?
- ☐ Is the copy on the home page about the outcome or results rather than the

features?

- ☐ If Capterra/Trustpilot/Facebook reviews are embedded on the site, do these open in a new tab?
- ☐ Can I see images of the product or are they just illustrations? How is the aesthetic design of the page?
- ☐ Does it look credible?
- ☐ If live chat is on the site, is there a proactive message?

Pricing page

- ☐ Is the value of the product reiterated?
- ☐ If no credit card is required, is that communicated?
- ☐ If the credit card is required, is that communicated?
- ☐ Does the CTA contain action-worded copy?
- ☐ If a learn more / contact sales button exists - does this actually work? Is the copy addressing common objections?
- ☐ Is the feature list worded simply or does it use product specific terminology?
- ☐ Is the pricing actually simple enough to understand?
- ☐ If live chat is on the site, is there a proactive message that is different to the home page?

Signup flow

- ☐ Does the copy handle objections around time/effort?
- ☐ Does the copy mention if a credit card is required or not?
- ☐ Are all the form fields necessary?
- ☐ Are there any social login options (Google/Facebook etc?)
- ☐ Does the password need to contain specific characters? If so, is this communicated before the user experiences an error?
- ☐ Is there additional social proof/testimonials on the sign up page? Is the copy formal or more casual?
- ☐ Have other distractions from the page been removed?
- ☐ Am I forced to verify my email?
- ☐ If email verification is forced, where did the email end up (probably in updates/spam)?
- ☐ Is their personalisation based on the details collected during the signup form?
- ☐ If there are additional form fields to fill out, does it tell me how long/which step I am on?
- ☐ Are all the questions actually relevant to me?
- ☐ Does it explain why it needs to ask me some of the questions? Am I asked “what are you trying to do today?”
- ☐ Do I know what I need to do next?
- ☐ Is the pricing and packaging clear and compelling?

First run experience

- ☐ Is there a welcome message and does it set expectations? Does the welcome message use personalisation?
- ☐ Is the next step clear?
- ☐ Am I being helped to achieve a quick win and experience the value of the product?
- ☐ If there is a video, is it short and concise?
- ☐ Are there links to additional onboarding resources like a help doc or blog post?
- ☐ If using in-app messaging are the messages relevant based on my progress?
- ☐ If I need to connect the product to a 3rd party data source, is there an easy way for me to do this / send instructions to someone else?
- ☐ Did I get sent a welcome email? (see the Welcome email section)
- ☐ Are there just icons or are they accompanied with text?

Product Adoption

Depending on your exact onboarding process, you may use different onboarding UX patterns (or product adoption tools). Below we've outlined the most common product adoption tools.

First Look Tour

[Identify your SaaS Onboarding Killers with a Product Onboarders Video Review \(just \\$249\)](#)

- ☐ Does the tour load the first time I land on a page?
- ☐ Is the copy short and concise?
- ☐ Am I being asked what I am trying to achieve first (aka the job to be done)?
- ☐ Is the product tour free of other product elements in the background? Is this tour actually going to help me experience the value of the product? Is it clear how many steps this tour will take?
- ☐ Can I skip the tour if I want to?
- ☐ Can I go back a step if I need to check the previous content? If using video, is the information also available in text?
- ☐ Is it clear what I need to do next?

Product Walkthrough Tour

- ☐ Am I being shown the rest of the product to increase familiarity with the product?
- ☐ Is it clear how many steps this tour will take?
- ☐ Can I skip the tour if I want to?
- ☐ Can I go back a step if I need to check the previous content? If using video, is the information also available in text?
- ☐ Is it clear what I need to do next?

Tooltips

- ☐ Is the tooltip explaining the value of the feature or how to use it?
- ☐ Is the tooltip actually helpful?
- ☐ Are there links to read more in the help docs if I want to?
- ☐ Does the tooltip stand out enough or is it easily missed?

Checklists

- ☐ Does the checklist start with an already completed step (like signed up)
- ☐ Are there around 3-5 items on the checklist?
- ☐ Are the checklist items easy to complete (a quick win)?
- ☐ Are these checklist items actually helping me experience the value of the product?
- ☐ If I'm being asked to invite a team member / friend, is this really the right moment for this?
- ☐ Will the checklist show me where I left off if I return to the product?

Progress Bars

- ☐ Does the progress bar start with an already completed step (like signed up)?
- ☐ Is the progress bar in an obvious position and not easily missed?

Demo Content

- ☐ If I need to connect the product to a 3rd party data source, is there demo content for me to explore and see the value?
- ☐ Is the demo content relevant for my use case?
- ☐ Can I play around with the demo data?

Empty State

- ☐ Am I being shown what I need to experience value during my free trial?
- ☐ Is the empty state educating me on how to use the product?
- ☐ Does the tone of voice match the brand?

Welcome Emails

- ☐ Is the welcome email sent to me immediately after signing up?
- ☐ Does it come from a person or a “support@” email?
- ☐ Is it using personalisation like {first name}?
- ☐ Does it have one clear CTA explaining what I need to do next?
- ☐ Is the CTA copy action oriented?
- ☐ Does it feel personal or transactional?
- ☐ Can I reply to the email if I want to?