



# The Product Adoption Dictionary:

Every UX Term  
You Need To Know,  
All In One Place.

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# The Product Adoption Dictionary:

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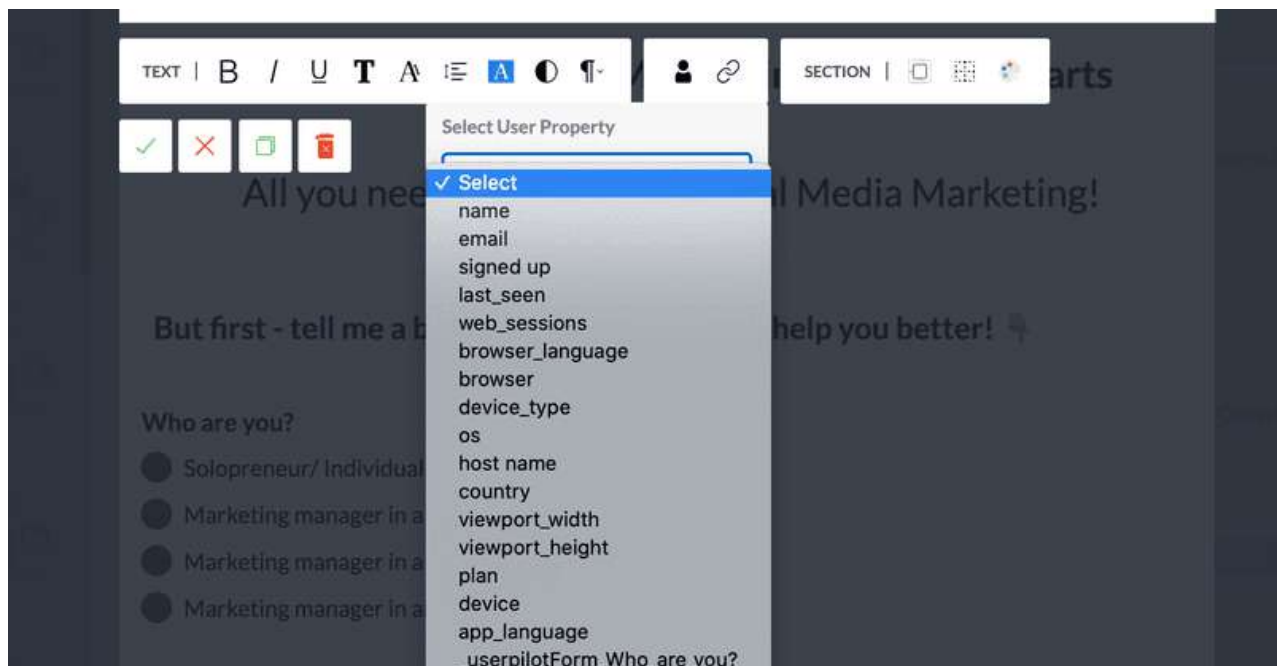
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# Account Attributes

Account Attributes are descriptive data (or metadata) associated with a record or user profile.

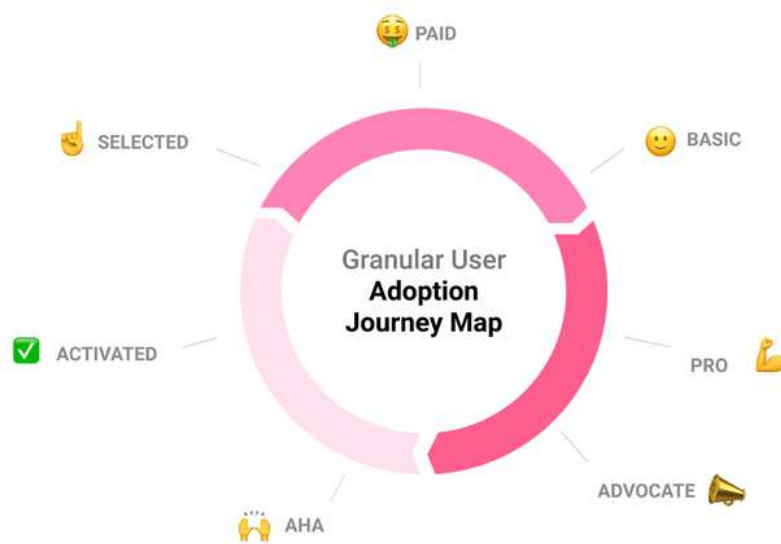
By recording the user's name as an Account Attribute, for example, it is possible to deliver a more personalized experience.

By recording the user's job title or priorities for using your app (which can be done during the [Sign Up Flow](#) or via the Welcome Screen), you can [Segment](#) users to provide more relevant and personalized onboarding.

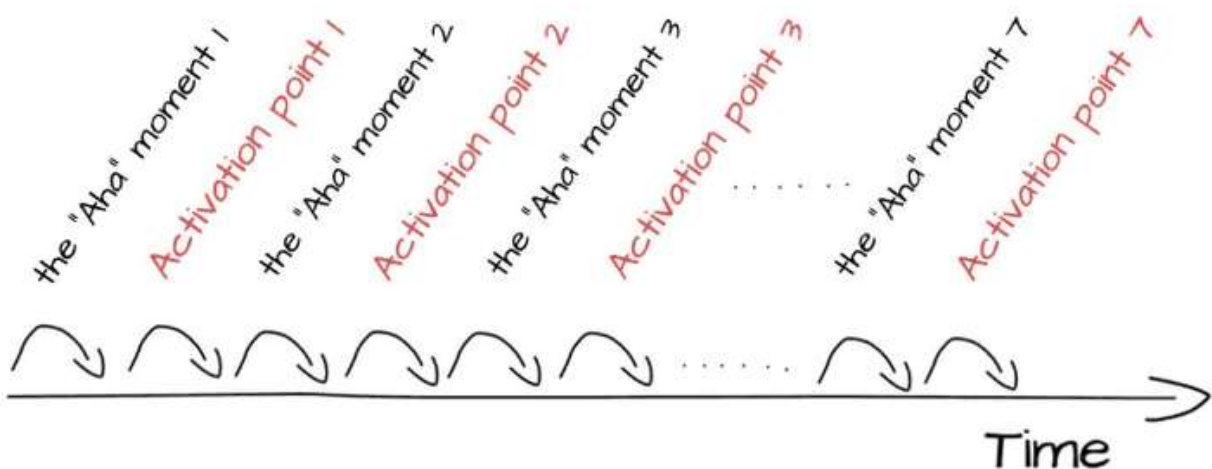


# Activation

An Activated user is someone who has realized [First Value](#) from your product or service.



Typically, users have an [Aha](#) moment when they see the potential of your product, then they Activate.

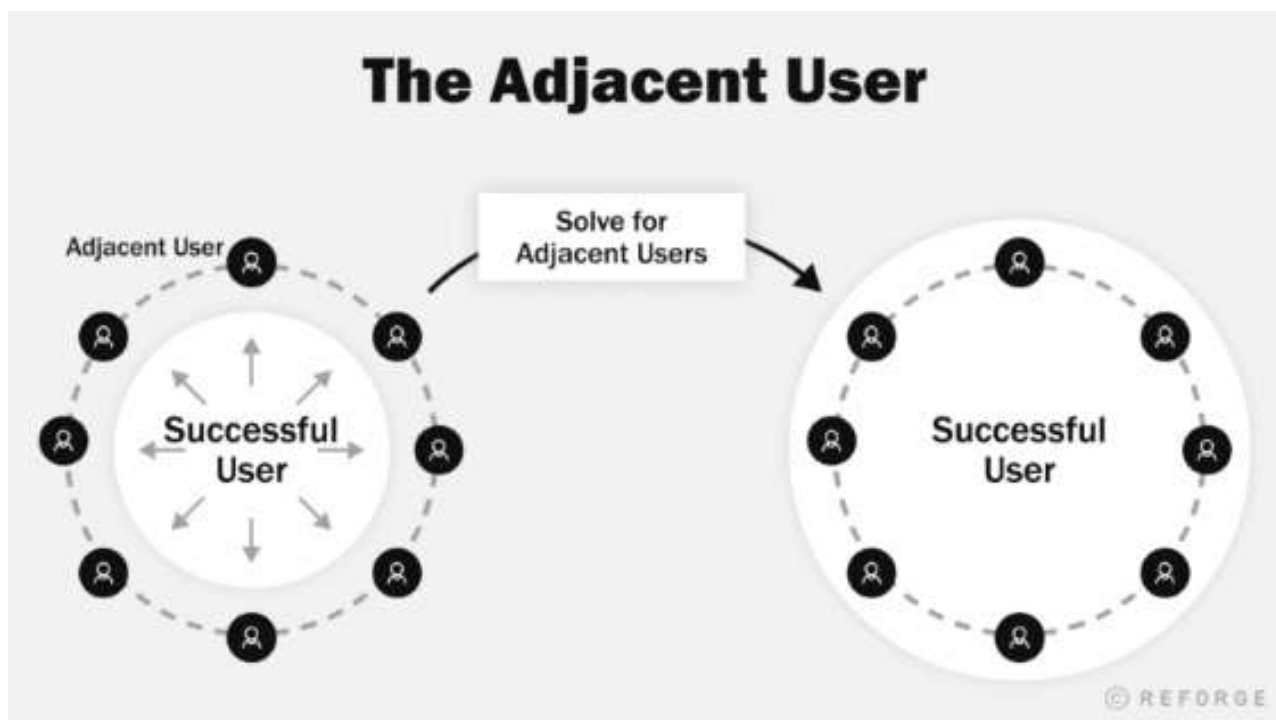


As one of the most important steps on the User Journey and one of the five Pirate Metrics, you need to define what counts as Activation for your product.

Your SaaS's Activation Rate is the percentage of users who get to that key event – and a lot of studies have found it to be that optimizing your Activation Rate has the greatest downstream impact on revenue of any KPI you should be tracking.

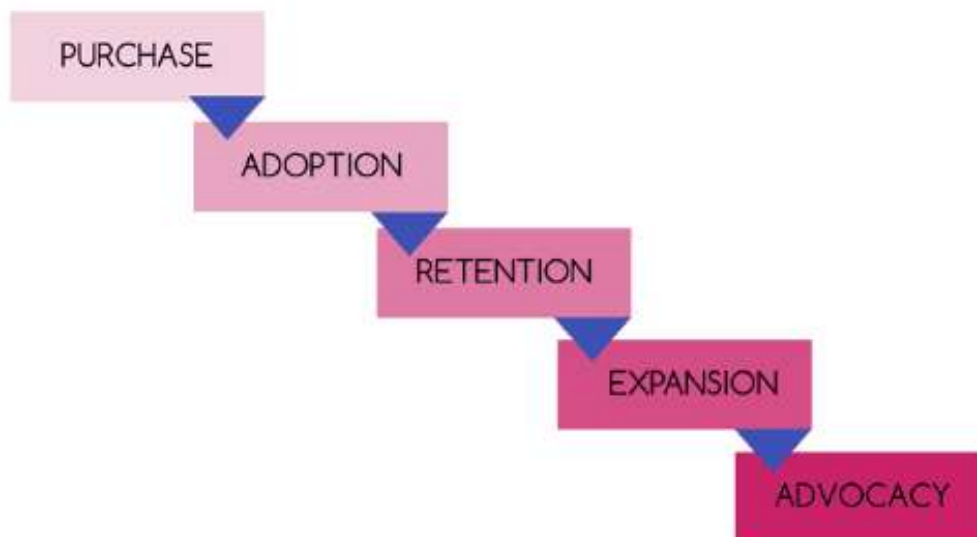
## Adjacent Users

Adjacent users are a segment of your total audience who are aware of your service, may be trying it out, but aren't successfully turning into engaged users. We wrote a whole blog about [how to capture adjacent users](#) a little while ago. With just a bit of help – in terms of product positioning and support – Adjacent Users can quickly be turned into successful users.



# Advocates

Advocates represent the peak of the [User Journey](#). Not just your most successful and engaged Power Users, but users that are proactively helping you to sell more by referring your service to their own contacts.



# Aha

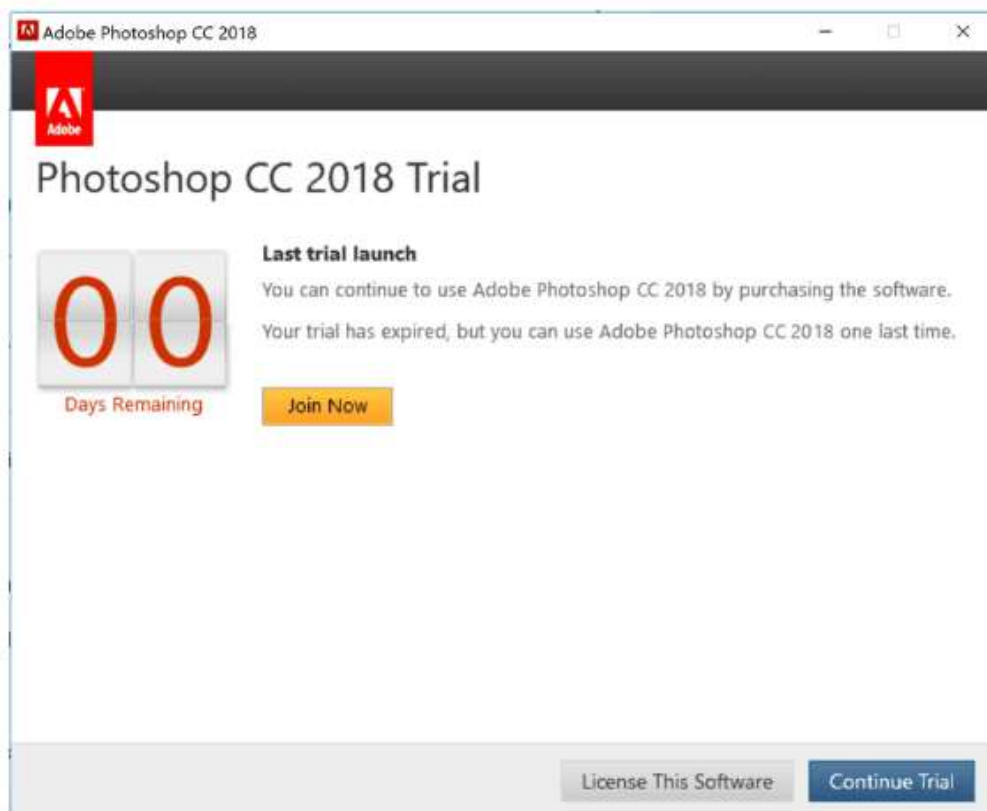
Not the 80s Norwegian pop superstars, but a critical step on the User Journey.

When we talk about “Aha!” we mean the moment that a user realizes that your service can meet a need they have and provide value to them.

It’s not when that promise is fulfilled (that’s [Activation](#)). The “Aha!” moment happens when the value of your service becomes clear to the user.

# Alerts

In-app Alerts are an interruptive way of notifying users about new information, actions required or other urgent details.



Alerts can appear in any UI form – [Modal](#), [Slideout](#), full-screen (as shown above) or [Tooltip](#). They differ from [Notifications](#) in that Alerts force users to dismiss them before continuing.

By interrupting users, Alerts can be frustrating and should therefore only be used for essential or time-sensitive communications.

# Application Header

This is your app's top-level navigation and tool bar.

It will be one of the first places new users look at when they log in for the first time, so it should be self-explanatory and intuitive to use.

The Application Header should include:

- The user's Avatar, to show when they are logged-in
- Links to the primary features of your app
- Options to manage the user's profile
- A bank of unread Notifications, if applicable

## Avatar

A user's Avatar is the graphical icon that represents them in-app when they are logged in – such as the one on the right.

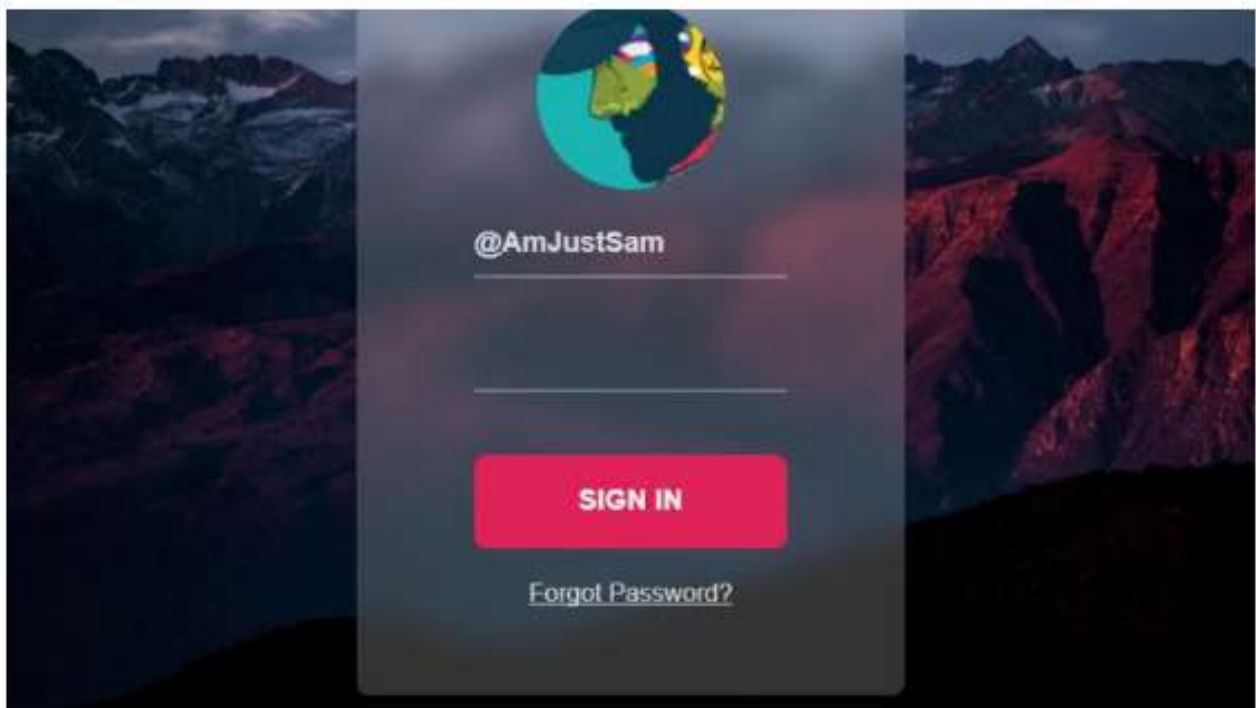
Many SaaS products allow users to upload their own Avatar image and customize their profile.





# Backdrop

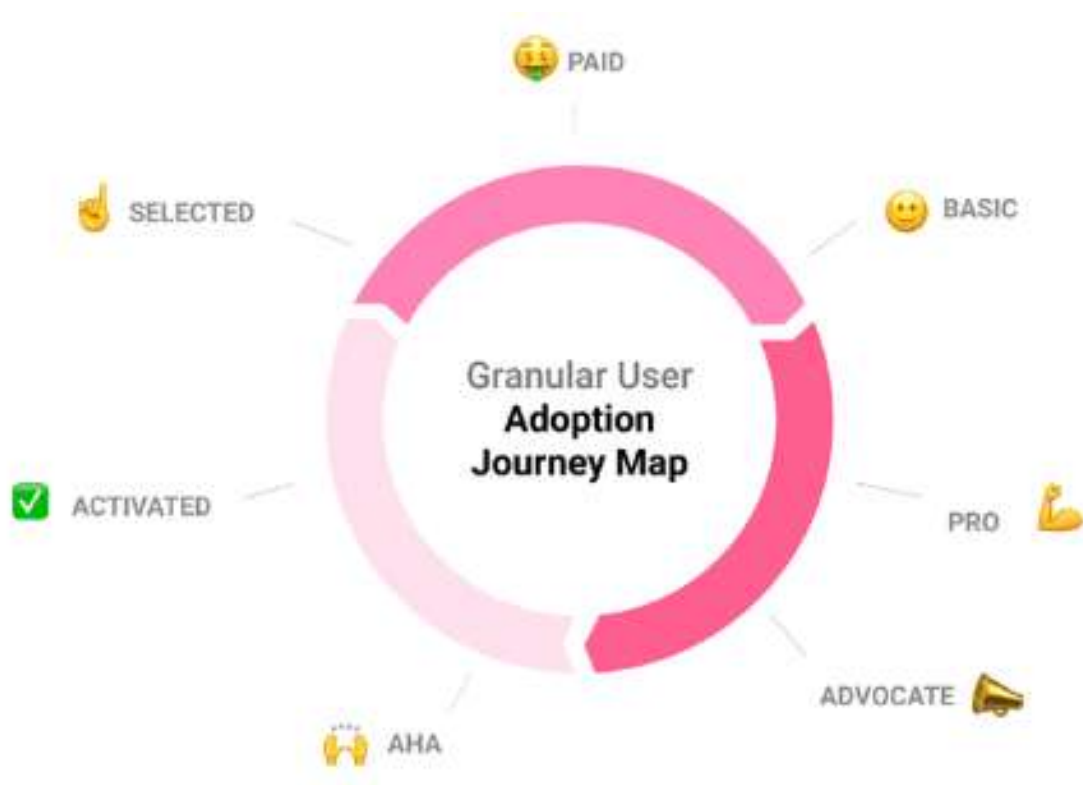
In CSS, Backdrop filters are used to overlay the main contents of a screen so that they can still be seen behind another window (often, a Modal).



There are loads of clever things people are doing with these filters, using color, translucence and other effects to highlight the foreground without completely obscuring the background.

## Basic Users

Your Basic Users are regularly using and benefiting from your service. They're happy, but they're not blown away and singing your praises.

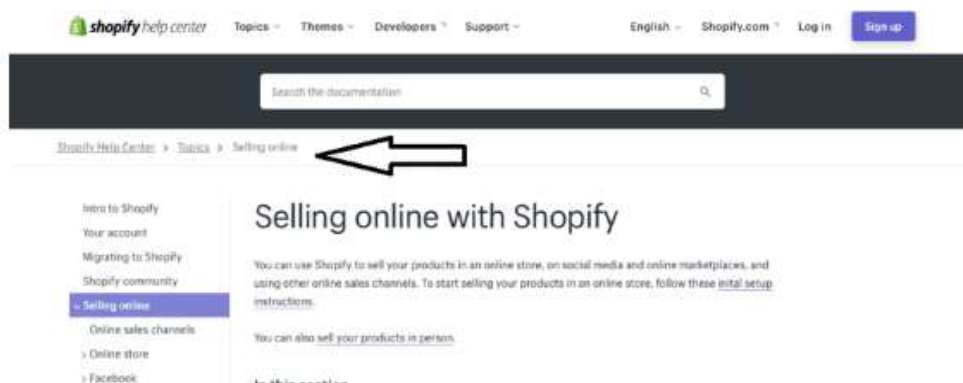


Basic Users tend to be unaware of the full range of features your service has. A classic scenario is when somebody is using laborious workarounds because they don't know how to do things more efficiently.

Using [secondary onboarding](#) (or continuous onboarding) is a good way to push your basic users to adopt more advanced features and correct inefficient user habits – thus moving them up the user journey.

# Breadcrumbs

Breadcrumbs are a simple piece of graphical UI which can act as secondary means of navigation. Breadcrumbs show where a current page sits in the hierarchy of a site or app.



# Buttons

Everyone knows what Buttons are, right?

But how much are you thinking about and [Experimenting](#) with their design?

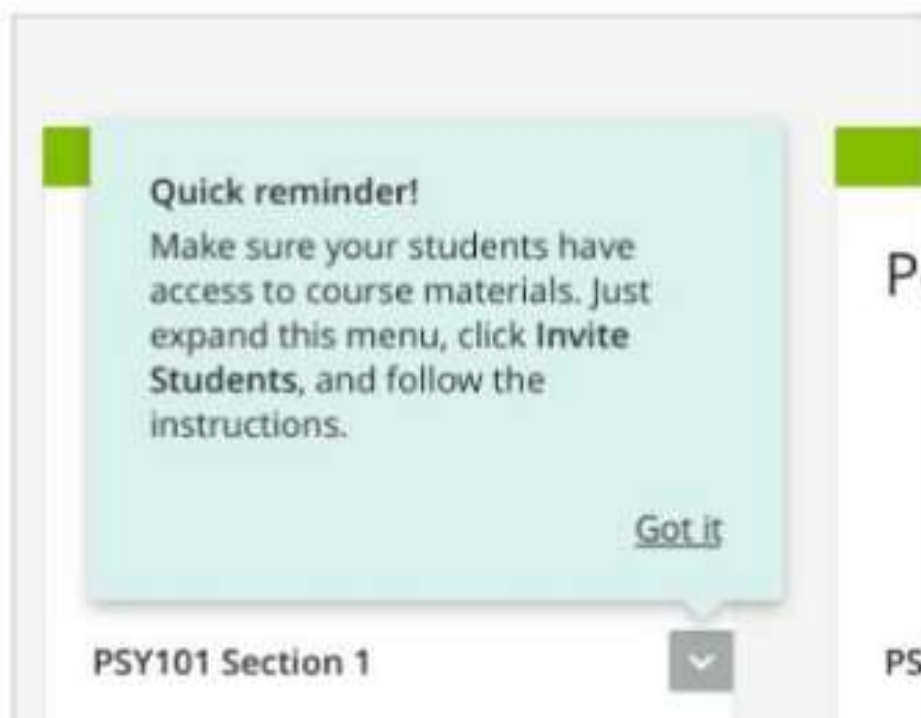
It has been shown time and time again that the following factors on Call To Action buttons can make a huge difference to conversion:

- On-screen placement
- Background color and text color
- The copy on the Button
- Contrast with other Buttons (always highlight the preferred option relative to others!)



# Coach Marks

Coach Marks are a [User Interface](#) element for providing [Contextual Help](#).



They are used to drive feature adoption by pointing out the benefits of a feature or how to use it.

They can load automatically or be [event-triggered](#) (for example, when the user hovers over an icon). What distinguishes Coach Marks from [Native Tooltips](#) is that Coach Marks only appear the first time a user encounters that element.

For this reason, they can be larger than typical tooltips and contain more information.

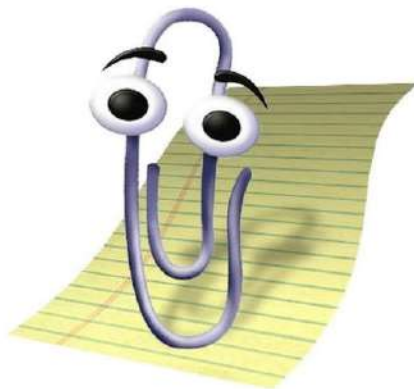
## Contextual Help

Great onboarding and customer success depends on knowing:

- What a user is trying to do
- What they've succeeded at and failed at before
- What they might want to do next

So if you can offer advice, guidance and notifications that are relevant at the right time, in the right place, you'll be able to drive users towards value. Contextual experiences are critical in successful UX.

Everybody hated Microsoft's Clippy character because he would offer irrelevant advice at random times.



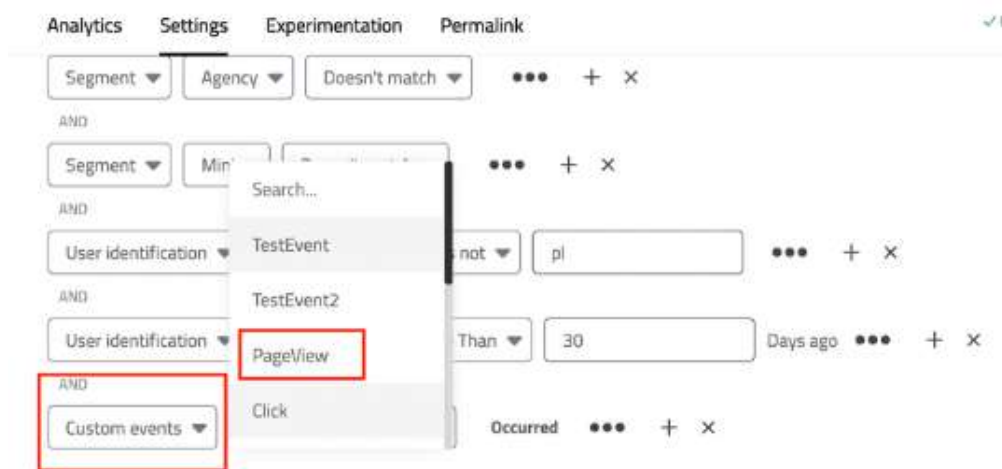
Microsoft was trying to do the right thing, but executed it wrong.

Today, it's much easier to model user workflows, track in-app activity, and trigger prompts based on user behavior.

Contextual Help is all about:

- Making sure your UI elements appear when they're useful
- Making sure they appear in locations that are intuitive and make sense
- Making sure that help doesn't get in the way if it's not wanted

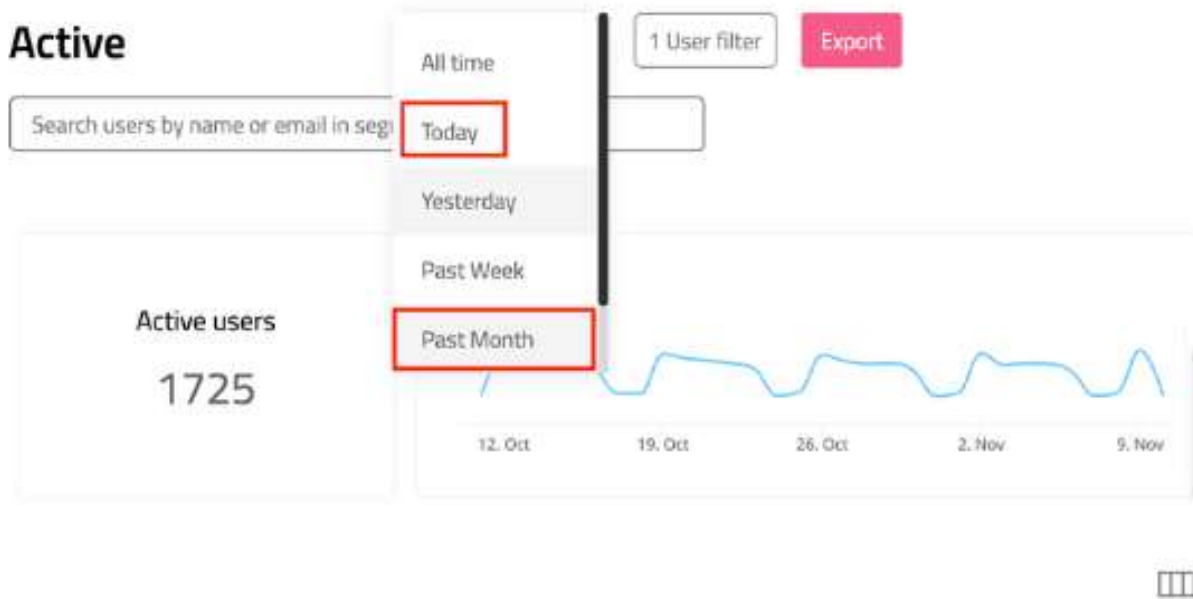
## Custom Events



Custom Events are events that happen in your app (e.g. button click, page view) you have defined for the purposes of Event Triggering, event tracking and analytics. They allow you to, for example, trigger experiences to specific segments of users based on their in-app behaviour (e.g. pageview X has occurred).

They contrast with the pre-defined, default events that are tracked or tagged automatically by your software. If a tool doesn't allow you to define and deploy Custom Events, it will be very difficult to tailor experiences to the specifics of your particular product.

## DAUs/MAUs



DAUs are Daily Active Users: the number of people who open and engage with your app on a given day.

MAUs are Monthly Active Users.

These metrics can provide important information about your product growth over time and user behavior.

Oftentimes, SaaS pricing is also based on your MAUs – you pay for the number of Monthly Active Users you have on the platform (this is the case in Userpilot as well).

# Day One Retention

Day One Retention is a very specific view of the Retention metric. It looks at the percentage of new users that do not churn by the end of their first day after sign-up. We dedicated a whole blog to why [Day One Retention is so important to monitor and how to optimize it](#).

# Driven Actions

In an Interactive Walkthrough or flow, a user may have to take a certain action before the next step becomes available. At Userpilot we call these Driven Actions, and they fall into five different types:



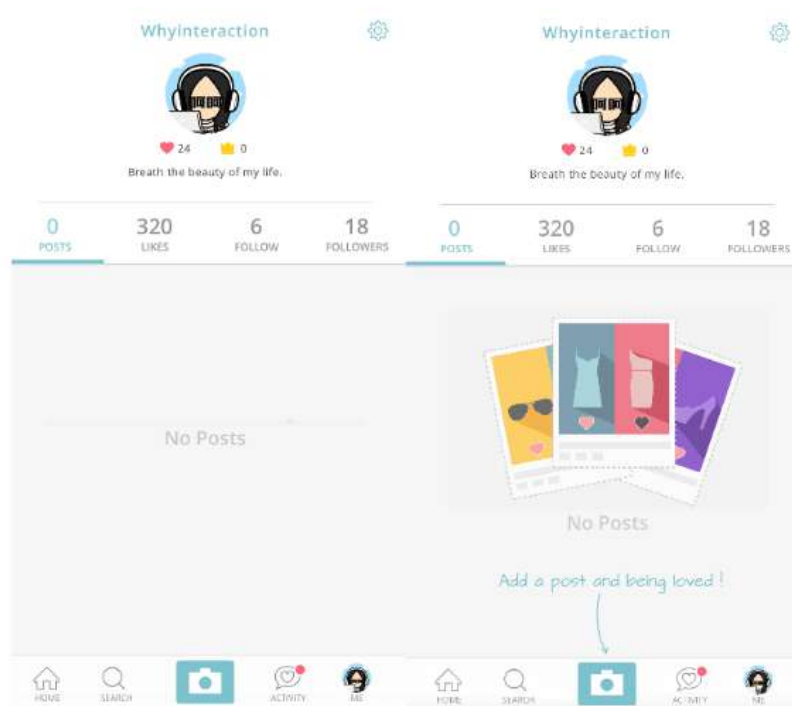
As part of our easy-to-use drag and drop experience builder, Driven Actions make it possible for you to prompt specific actions as part of onboarding flows.



## Empty States

Also known as the “white canvas” problem, Empty States are what a new user can be confronted with when they open up your app for the first time in the absence of clear Primary Onboarding.

Compare the examples below from Smashing Magazine:



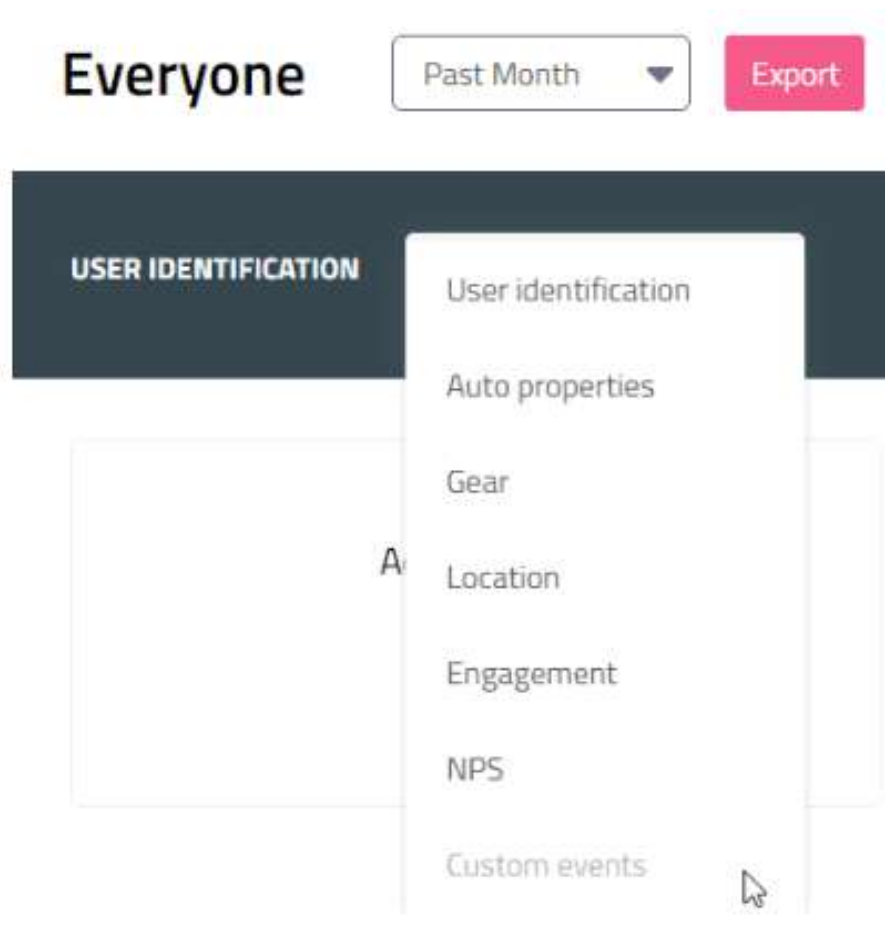
The version on the left gives no guidance to the user as to what they should do next. The version on the right, however, banishes the Empty State problem with some suggestions on how to get started.

Your Primary Onboarding needs to ensure that new users are not presented with “dead ends” where they can’t see how to proceed.



# Dropdown

A Dropdown is a UI element that allows a user to make a selection from a preset range of options.



## Event Triggering

If you want to provide [Reactive Onboarding](#) to your users – to serve up help to them where and when they need it – then you need Event Triggering. Many SaaS products allow you to track and monitor in-app events. Compiling this data to see behavioral trends is one of the main purposes of Usage Analytics.

It can also be used to tailor responsive in-app experiences. Be sure to:

- Cross-reference certain actions against User Segments for accuracy
- Avoid repetition by restricting the number of times a new experience step is triggered by an Event

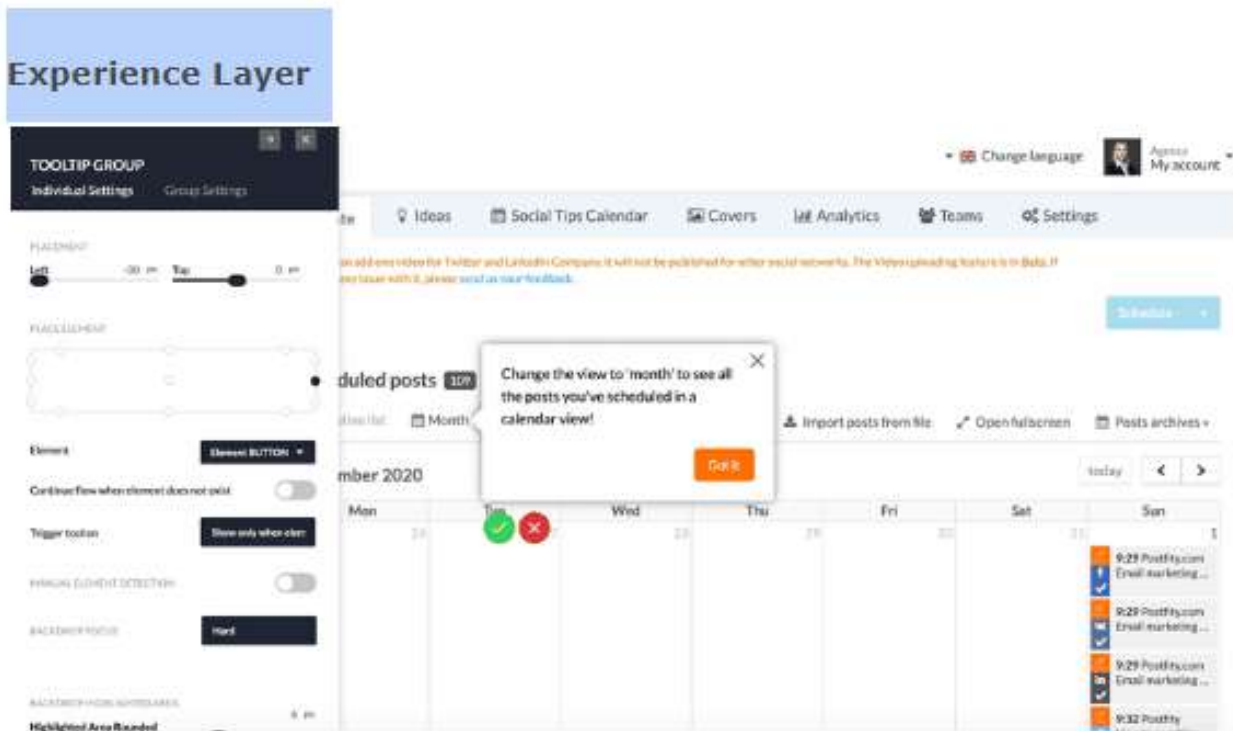
Combined with these tactics, Event Triggering can allow you to give really targeted experiences to a range of different users.

## Evergreen Onboarding Flow

An Evergreen Onboarding Flow is the principal, permanent journey through the [Adoption](#) process. When you launch new features or make other changes to your UX, you'll need to introduce those changes to new users and existing users. This can be done via Modals, new Welcome Screens, or even a Feature Release Widget.

But when a change is no longer new, it's important to stop presenting it as such and incorporate it into your Evergreen Onboarding Flow. The best way to do this is to study Usage Analytics and build onboarding experiences that correspond to the different use cases.

# Experience Layer



Your product's Experience Layer is what sits "on top of" the native UI to allow it to provide personalized, contextual experiences. Unlike a [Product Tour](#) or even many [Interactive Walkthroughs](#), Experience Layers provide a completely Reactive form of onboarding – that responds to whatever the user is doing.

Your product Experience Layer needs to be carefully designed to provide the most appropriate [Contextual Help](#). By understanding the users' progress along the [User Journey](#) and what they are trying to achieve, it helps to guide users to complete the most valuable actions.

# Experimentation

In order to optimize your User Experience, it is vital to test different UI elements, navigation options and other factors against one another to see which changes help users realize more value.

## Experimentation

Do you want to run an experiment for this experience against the specified goal before rolling it out to all users in the segment?

Roll out for all users in the segment

This experience will roll out to all users in the specified segment without testing its effect on the goal first. We highly recommend c

Run an A/B test (Null hypothesis)

We will split the audience for this experience in half to two groups, Group A (50%) and Group B (50%). Group A (the control) will not s  
effect on driving up the specific goal.

[This blog spells out the principles of running good product experiments](#), including A/B or split tests and multivariate tests.

Experimentation can be used to target improvements in user [activation](#), feature adoption, retention, and many other KPIs. In any case, they need to be carefully designed.

- User Segments need to be selected to take part in the experiment
- Duration needs to be specified
- Note what you choose to test against what
- Note what you aim to learn from the experiments

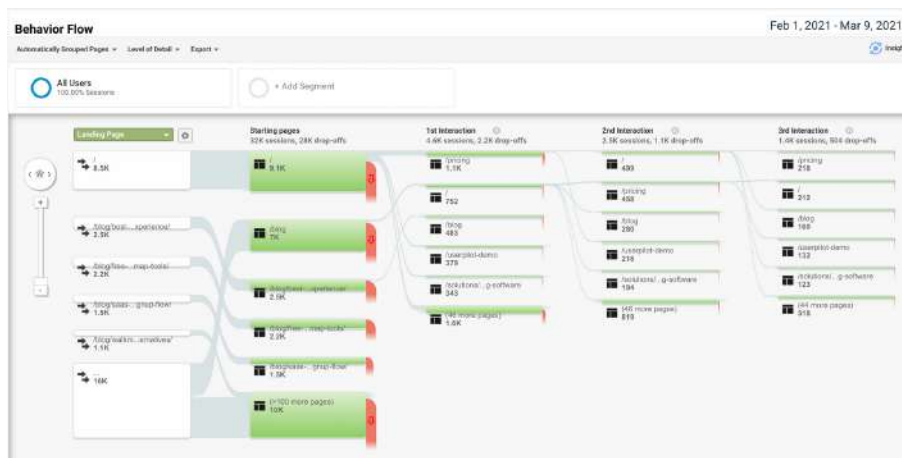
# Feature Release Widget

When you introduce a new feature to your SaaS, you want everybody – new users and existing users alike – to know about it.

New features are by definition not a part of your [Evergreen Onboarding Flow](#), and so need bespoke measures to bring attention to them. We've written a blog all about [maximizing new feature adoption here](#). A bespoke widget is a powerful alternative to a simple Alert or Notification to really drive users to the new functionality and concentrate all the resources relating to getting the best out of it in one place.

## Flow Analytics

Flow Analytics is a subset of Usage Analytics that focuses on how users move around your app. Flow Analytics lets you see where users are dropping out of your planned journeys and where they are actually going. Here's an example of a flow analytics (User Flow) report from Google Analytics:





# Forms

Example of a form on a Postfity Welcome Screen made in [Userpilot](#):

Tell me a little about yourself...so I can help you better! 🖱️

Who are you? 😊

- An individual/ Solopreneur
- A social media marketer in a company
- A VA/ social media marketer in an agency
- A social media agency owner

What will you be using Posfity for?

- for myself
- for my business/ employer
- for multiple clients / as an agency

Forms are used to collect information from users. They should almost always be used in your [Sign Up Flow](#) and possibly in other parts of the UX.

To ensure that the user's experiences are as frictionless as possible, your forms should only request essential information at this stage of the User Journey.

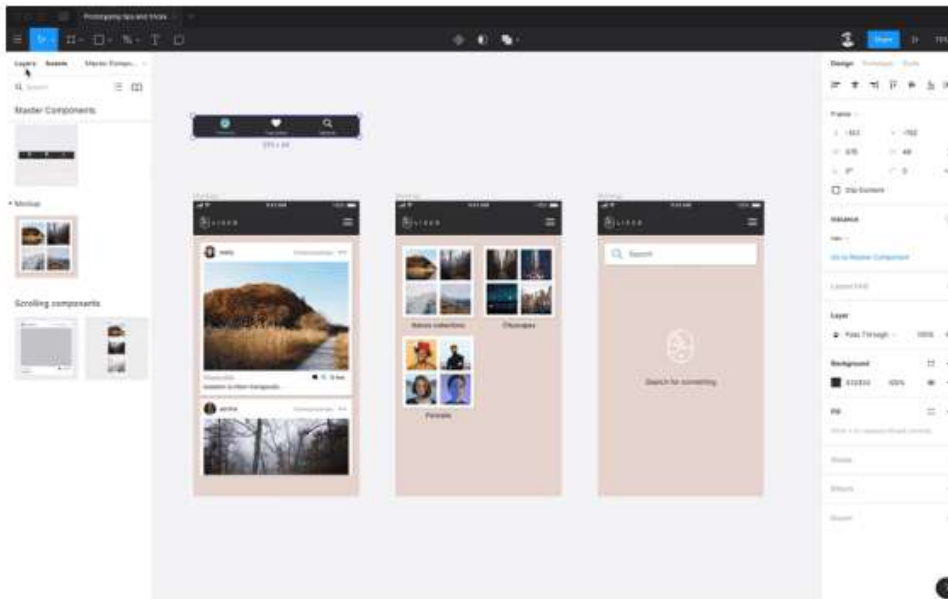
Data that is not needed to complete registration should be collected at a later stage, when there's more clarity in why you need it.

# Freemium

Freemium is a business model where a basic product is provided free of charge, but there are charges for additional features, services that add to the functionality of the free product.

# GIFs

GIF stands for Graphical Interchange Format. It is an image format that supports both static and animated images.



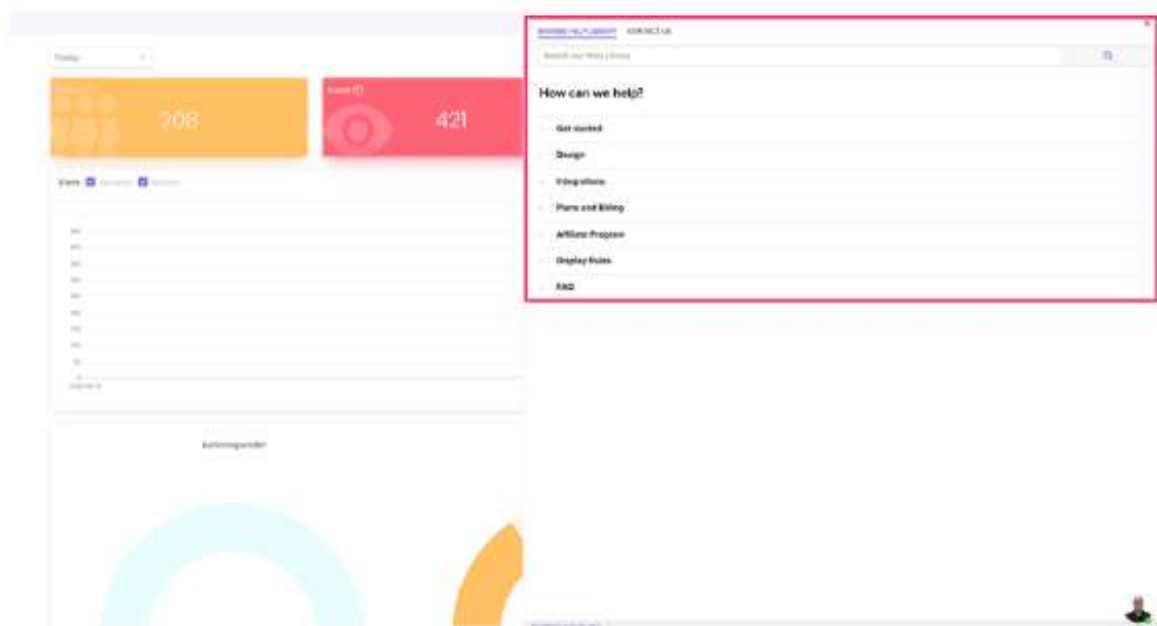
From a Product Adoption point of view, GIFs can support onboarding by providing a quick and easy way to include short in-app videos.





# Help Widget

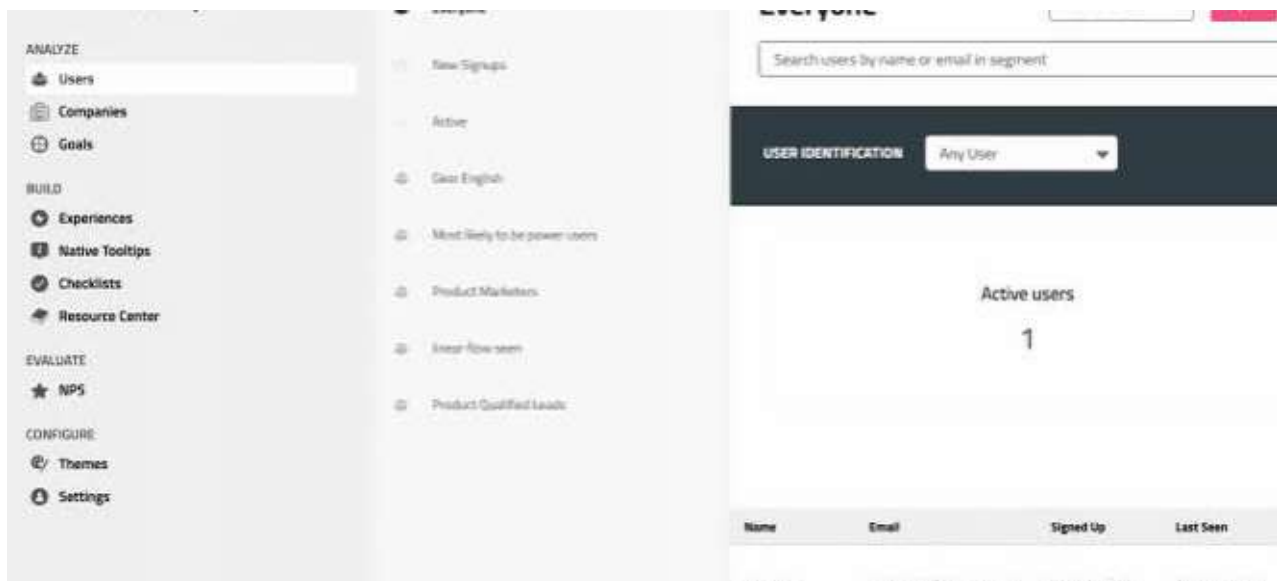
A Help Widget is an ever-present or easy-to-find tool for accessing help resources.



By bundling your [Resource Center](#) documents and Live Chat support together in one place, Help Widgets make it very clear to users how to find the answers to problems that they have. As such, a Help Widget is a vital part of providing a smooth User Experience.

# Hotspots

Hotspots are a more subtle version of [Native Tooltips](#) or Coach Marks.



As shown above, a gently animated indicator is used to draw a user's attention to a certain point of the UI. When users click on this hotspot, helpful information is displayed.

Hotspots are good for promoting feature adoption without interrupting a user's workflow – because they are relatively easy to ignore and do not need to be dismissed.

# In-App Videos

72% of people say that they prefer to learn using video over other formats.

If you're not using videos in your onboarding materials – in your Product Tours, Interactive Walkthroughs, a Resource Center, or a Help Widget, you're missing out.

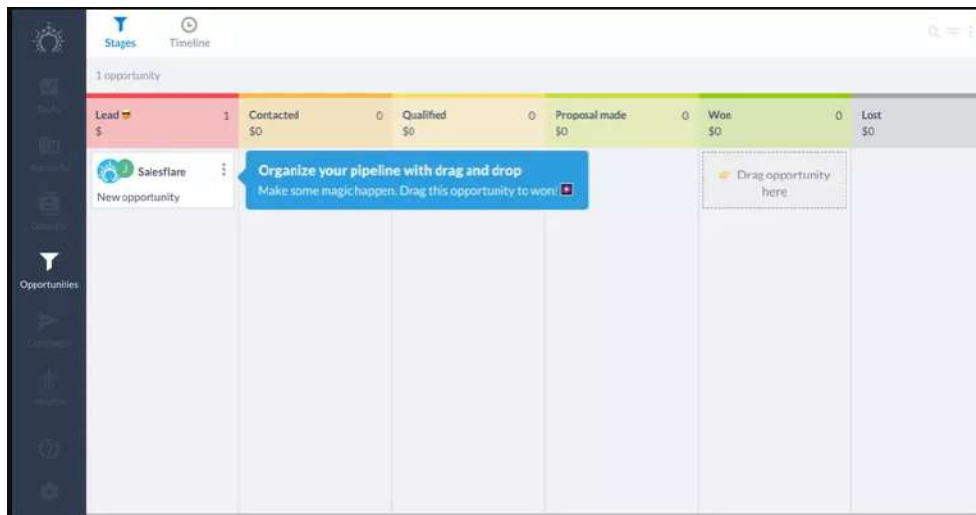
They don't have to be complex, expensive, or high-spec. Often simple GIFs can demonstrate how to complete tasks quite effectively.

In-app videos don't always have to be educational either. Because they are so eye-catching, videos give you the opportunity to entertain and delight your users as well.

# Interactive Walkthroughs

Most people learn by taking action and doing things.

Really effective onboarding doesn't just show users product features. It gets them using them so that they realize value on their own.



For example, CRM SaaS SalesFlare doesn't just show users how to connect their calendar – it actually drives them to do it. And then once it's done, users understand how easily it is to reap the benefits.

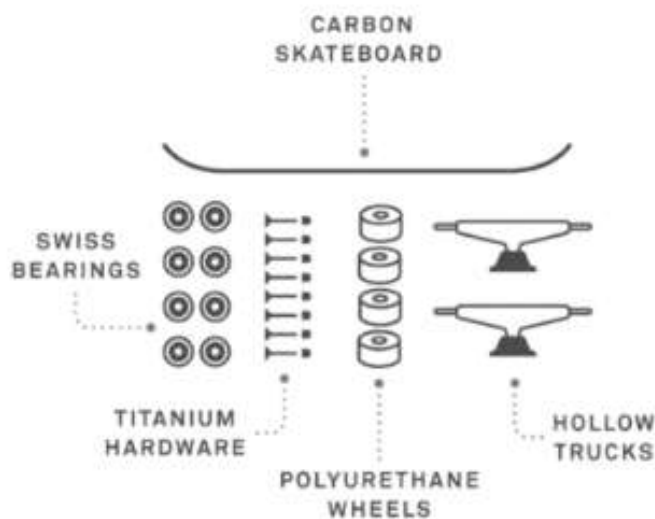
[Userpilot](#) enables you to build Interactive Walkthroughs quickly and effectively with our unique systems of [Driven Actions](#).

## Jobs To Be Done

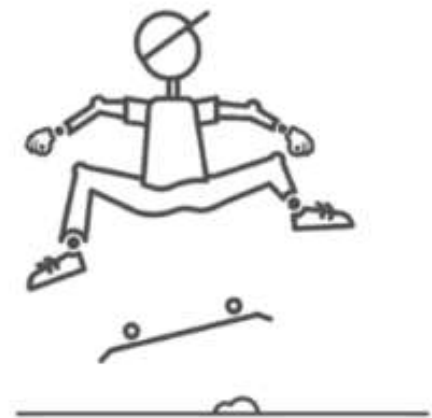
Jobs To Be Done (JTBD) is a theory of consumer or user action. It says that users choose and use products because they get certain important “jobs” done.

A JTBD approach therefore stresses user needs and their fulfilment over product features. Like this:

Even though customers buy this...



...they really want this.



In User Experience design, it's important to think about users' Jobs To Be Done.

By thinking about their users' JTBD, some of the most successful SaaS companies in the world – like Slack – have managed to [sell to widely different industries, demographics and use cases.](#)



## Live Chat

There are only a limited number of problems and use cases you can prepare for when building a self-serve onboarding experience. For all those unique troubleshooting cases – and for users who prefer interacting to solve their problems – it may be good idea to include a Live Chat function as part of your UX.

That doesn't mean you have to have operators constantly standing by. Chatbots are great for sorting out simple issues and for triaging more complex needs. Here at Userpilot, [Drift's AI Chatbot](#) is a key part of our customer success stack.

## Microsurvey

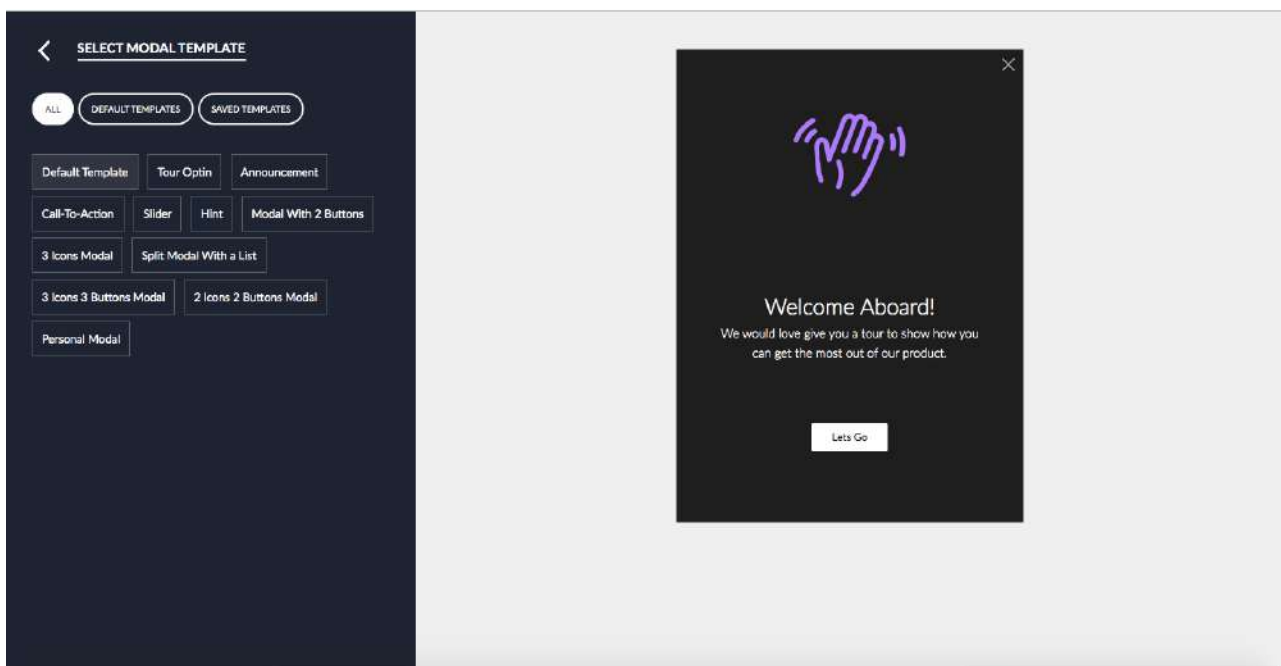
Microsurveys are very short, highly contextual requests for feedback. Usually shown in-app, possibly Event Triggered, to elicit users' immediate reactions. Because of their contextual nature and smaller request – microsurveys are generally less intrusive or annoying to users than other types of requests.

The image shows a mobile app interface for a Userpilot microsurvey. At the top right is an "Ask me later" button. The Userpilot logo is centered. Below it is the question: "How likely it is that you would recommend ABC Software to a friend?". A horizontal scale of 11 buttons (0-10) is shown, with the button for "10" selected and highlighted in black. Below the scale, "Not likely" is on the left and "Extremely likely" is on the right. A small Userpilot logo is in the bottom right corner of the survey box.

Read [more about how to make the most of Microsurveys](#) here.

# Modal

A Modal is a graphical UI element that opens a new window on top of the main window, either blurring or disabling the main window until the modal is dismissed.



Their main uses in [Product Adoption](#) is to draw attention to vital pieces of information, to block the interaction flow until a certain action has been taken (in conjunction with Driven Actions) or a message has been seen.

A Modal that darkens the window behind it but can be dismissed with a click outside the Modal window is called a Lightbox.

# Native Tooltips

Native Tooltips are a common graphical User Interface element. They provide [Contextual Help](#) aimed at driving adoption and onboarding.



Although the term “tooltip” is widely referred as Coach Marks too, a lot of UX experts differentiate them, saying that Native Tooltips are perpetual while Coach Marks – once dismissed – are gone forever.





## No Code

No Code platforms allow people to build web and mobile apps without writing code. Instead, functionality is built using a Graphical User Interface.

For example, Userpilot is a No Code platform for building Product Adoption experiences.

Some tools that claim to be No Code are in fact “Low Code” – that is, their full capabilities can only be realized if you have coding knowledge.

*For example, while Appcues also allows users to build onboarding experiences, advanced styling of UI elements relies on users being able to use CSS.*

## Notifications

In-app notifications are typically short informational or instructional messages. They can be used to announce new features, draw a user’s attention to a desired action or let a user know about the completion of a task. As a rule, Notifications will disappear without needing to be dismissed. They differ from [Alerts](#) in this way.

Notifications are less interruptive than Alerts and so are better suited for conveying non-essential information that can be ignored.



# NPS

NPS stands for Net Promoter Score, and is a very simple and widely-used measure of customer satisfaction.

The question asked in an NPS Microsurvey is as shown below in this example from Userpilot:

Ask me later

userpilot

How likely it is that you would recommend ABC Software to a friend?

0 1 2 3 4 5 6 7 8 9 10

Not likely Extremely likely

Userpilot

Net Promoter Score is calculated by subtracting the % of Detractors (respondents scoring from 0 to 6) from the % of the Promoters (who score 9 to 10).

An NPS figure that is greater than zero is generally deemed to be positive, but as we explained in this blog, the [benchmark for SaaS companies is a +26 NPS score](#).

## OAuth

OAuth is an open standard for enabling users to grant web applications access to their data from other sources without a password. It is the mechanism by which Twitter, Facebook, Google, and many other sites allow users to log in to third-party applications using their account details.

OAuth can be helpful for making a Sign-Up Flow friction-free.

## Paid Users

Once someone has selected your app over the competition, moved forward in the User Journey, and has decided to pay for your product, they are considered a paid user.

## Pirate Metrics

[Dave McClure](#) famously called the five most important groups of KPIs for Product Managers “Pirate Metrics” because of their initials: AARRR! Pirate Metrics are particularly important because they encourage you to think in terms of the entire customer lifecycle and not just one part of it.

- Acquisition – concerning new sign-ups
- Activation – concerning the conversion of sign-ups to successful users
- Revenue – concerning paying users and how much they pay
- Retention – concerning how long paying users stick around for
- Referral – concerning users who recommend your service

# Primary Onboarding

Primary Onboarding is the process of getting new users up to a basic competence in using your product/service and realizing value from it.

This concept is strongly connected to:

- [Activation](#) – the goal of Primary Onboarding
- [Time To First Value](#) – your Primary Onboarding needs to be clear and simple enough as to minimize this variable

A good primary onboarding process will look to optimize:

- Sign-Up Flow
- The impact and value of the Welcome Screen
- User Segmentation, to allow a more personalized experience
- Minimize the offputting appearance of Empty States

## Pro/Power Users

Pro Users or Power Users are the guys your SaaS can learn from!

They are using mostly or all of your features, they are integrating your app alongside other services in their own workflows, they're actively engaged with you and providing valuable feedback.

They're bought-in, loyal and getting great value from your service!

# Proactive Onboarding

When you onboard a user “proactively” you are not waiting for a user to take action, but instead you are driving the action in anticipation of their needs.

Proactive Onboarding is best suited to cases where there are things a user just HAS TO do or learn in order to achieve value from your service. You take them step-by-step through a workflow that has already been set out in advance, because you know it will be the quickest path to value.

Product Tours are a form of Proactive Onboarding – however, sometimes there are serious drawbacks to using this approach exclusively.

## Product Adoption

Product Adoption is what it’s ALL about!

It’s the overall process by which people:

- Become aware of a product
- Recognize and understand the value it can offer them
- Begin to use it and keep on using it over time

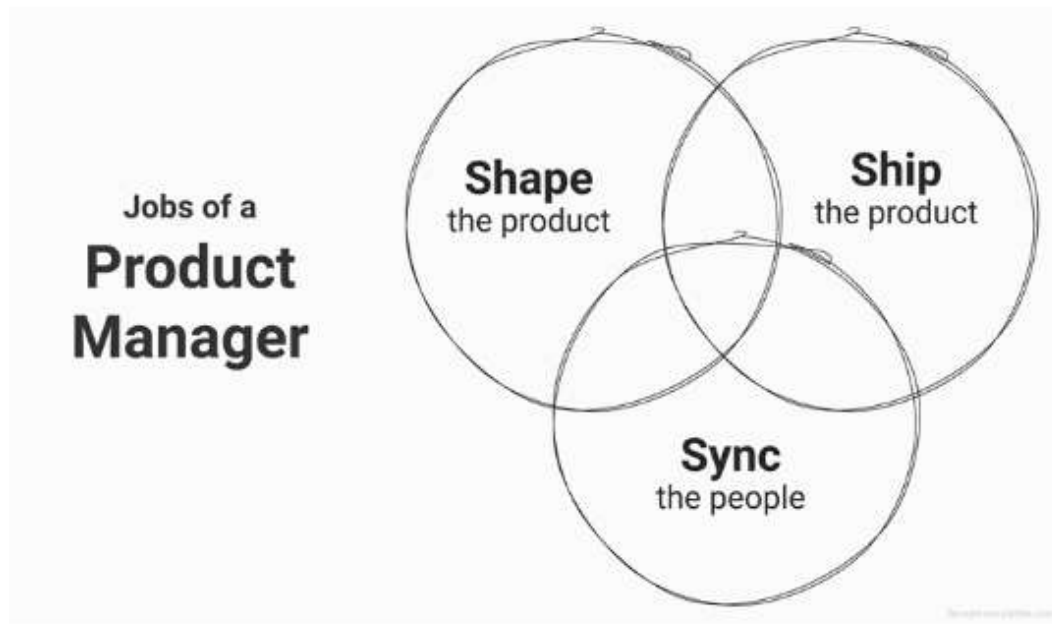
It encompasses marketing, acquisition, Primary Onboarding, [Activation](#), [Secondary Onboarding](#), [Retention](#), [Tertiary Onboarding](#)... pretty much EVERYTHING covered in this dictionary.

Value realized by users is ultimately what drives adoption, and that’s what [Product-Led Growth](#) is all about.

# Product Manager

The Product Manager is a key figure in most SaaS companies. Their role is (usually) to stand at the center and ensure that:

- Users' needs are understood and fulfilled
- Developers can meet users' needs with deliverable features
- Marketing and sales team members know how to present the service to potential customers



In a growing number of companies, the Product Manager is NOT responsible for improving Product Adoption. This falls to the Product Marketer.

# Product Marketer

In the Product-Led Growth business model, the product itself is one of the key marketing tools that drive adoption, acquisition, and retention.

The Product Marketer is responsible for making sure that it happens by:

- Optimizing the product and its features to deliver maximum value
- Ensuring that the product's strengths are made clear to users
- Making sure that users are ready for Upsells
- Onboarding new users quickly and effectively

See this [discussion we had with several Product Marketers](#) to get a more detailed picture of what the role entails.



As a product marketer in a product-led company, I was responsible for the whole funnel from the signup, through PQL, through customer acquisition to retention

Parth from [Kommunicate.io](#)



# Product-Led Growth

According to Wes Bush – one of the first authors on this topic,

Product-Led Growth is :

*A go-to-market strategy that relies on using your product as the main vehicle to acquire, activate, and retain customers.*

Rather than using separate sales and marketing materials to convince people to try your service, the Product-Led Growth model calls for you to let users try your product out and see if it works for them. If it does, that is much more powerful than any sales pitch!

This is the philosophy that leads so many SaaS companies to embrace a free trial or [Freemium](#) approach.





# Product Tours

In the old wild west days of SaaS, new users would often be forced to sit through a live demo, a long video, or just stopped in their tracks with a load of explanation every time they tried to do anything in-app.

Product Tours aim to show new users **EVERYTHING** about a service upfront – regardless of User Segmentation, context or the users' specific Jobs To Be Done.

As we argued in [this everybody hates product tours blog](#), Product Tours are ineffective for onboarding. They're rarely relevant or personalized – and are usually patronizing to some and overwhelming to others.



A vastly superior approach is to create [Interactive Walkthroughs](#).



# Reactive Onboarding

Unlike [Proactive Onboarding](#), Reactive Onboarding waits to see what a user is trying to do and then offers them [Contextual Help](#).

Once a user has achieved basic [Activation](#), there are likely many different use cases that they may wish to prioritize. If you try to push them down one route – for example, by making them sit through a Product Tour – it could annoy, bore, or frustrate them.

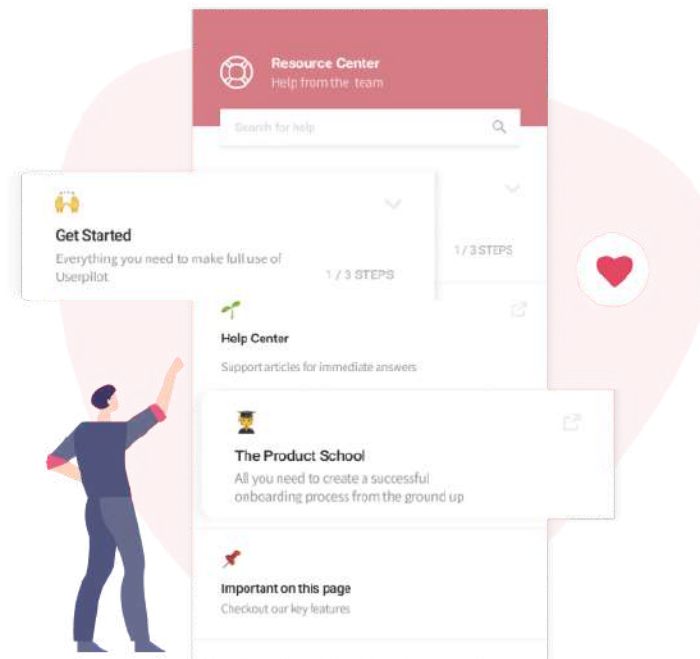
One of the principles of Self-Serve onboarding is allowing users to find their way around your product.

Your Reactive Onboarding – whether it's from a [Help Widget](#), Contextual Help, Live Chat or Interactive Walkthroughs – are there to make sure users can do whatever they want, successfully.



# Resource Center

Your Resource Center (also known as Knowledge Bases) provides on-demand help for your users, often in the form of a document or video library. It provides detailed step-by-step information on the majority of principal use cases that users have.



The hierarchically arranged documents explain how to do most of the things that Userpilot enables you to do. Resource Centers offer a type of [Reactive Onboarding](#) – materials that are there waiting until a user needs them.

To offer additional support you should also include:

- A Help Widget, giving quick and easy access to the resources
- A Live Chat tool, so that users can get in touch for one-on-one advice



# Retention

In SaaS, Retention is a key metric (one of the [Pirate Metrics](#)) that looks at the use of your product – and payment for it – over time.

Generally, it is calculated as a percentage of your user base that has continued using your product over a fixed period of time (eg 95% per year). It can also be the inverse of churn. That is, a 95% annual retention rate implies a 5% annual churn rate.

Retention is also widely used as an indicator for overall customer satisfaction.

## Secondary Onboarding

The User Journey does not stop at Activation or First Value. There are lots of later states related to deeper engagement and greater value (see [Selected User](#), [Paid User](#), [Basic User](#), [Power/Pro User](#), [Advocate](#)).





Secondary and [Tertiary Onboarding](#) are the processes of advancing users to these further stages – [we wrote in detail about them here](#).

Secondary Onboarding is about increasing feature adoption, helping users to complete tasks, and beginning to develop habits of using your app.

All these things drive more value to users than what they initially realize. That promotes Retention and Revenue (see [Pirate Metrics](#)).

## Selected Users

The next stage on our model of the User Journey after Activation is Selected User.

There are more than 8,000 martech SaaS companies out there. Chances are, many of your users are testing your service against rivals.

The point of Selection is when a user has decided to choose your product over the competition.

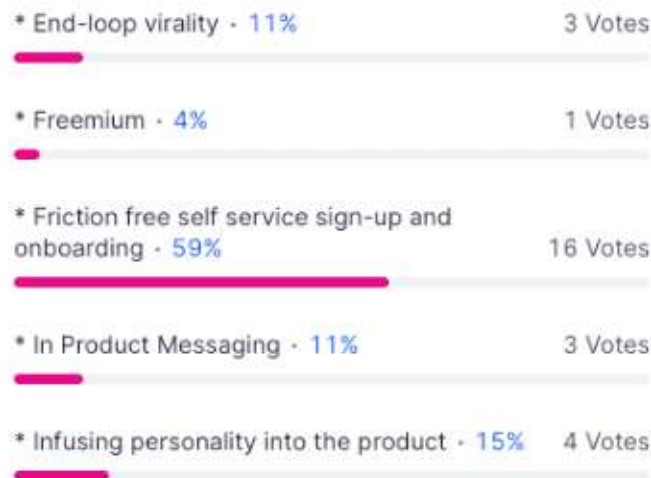
You would expect to see Selected Users engaging across a wider range of features, making a lot of use of your Resource Center or Help Widget and showing an interest in premium features.



## Self Serve

SaaStock Remote 2020 attendees rated that providing frictionless Sign Up Flow and Self Serve Onboarding were their most successful Product-Led Growth strategies.

### Which PLG (Product Led Growth) strategy is the most important one for you?



The vast majority of SaaS product don't support a sufficiently high enough Customer Lifetime Value to justify one-on-one onboarding of new users. If you're growing fast, you wouldn't want to offer it even if it made financial sense.

So Self Serve is the standard for onboarding in SaaS, and most of the entries in this dictionary are concerned with the terminology surrounding this standard.



# Sign Up Flow

A Sign-Up Flow is a process by which new users register with you to use your software. It's a key part of the User Journey that usually sits between the Aha moment and Activation, as a kind of prelude to Primary Onboarding.

It involves collecting enough information (usually via Forms, and stored as [Account Attributes](#)) to set up their profile, authenticate their identity and assign user roles.

The best practice for UX calls for the Sign Up Flow to be made as frictionless as possible.

- Ask for less information – especially payment information – and more people will complete the process
- Many SaaS providers collect data over multiple touchpoints rather than all at once, using [Microsurveys](#) or other downstream and/or contextual messages

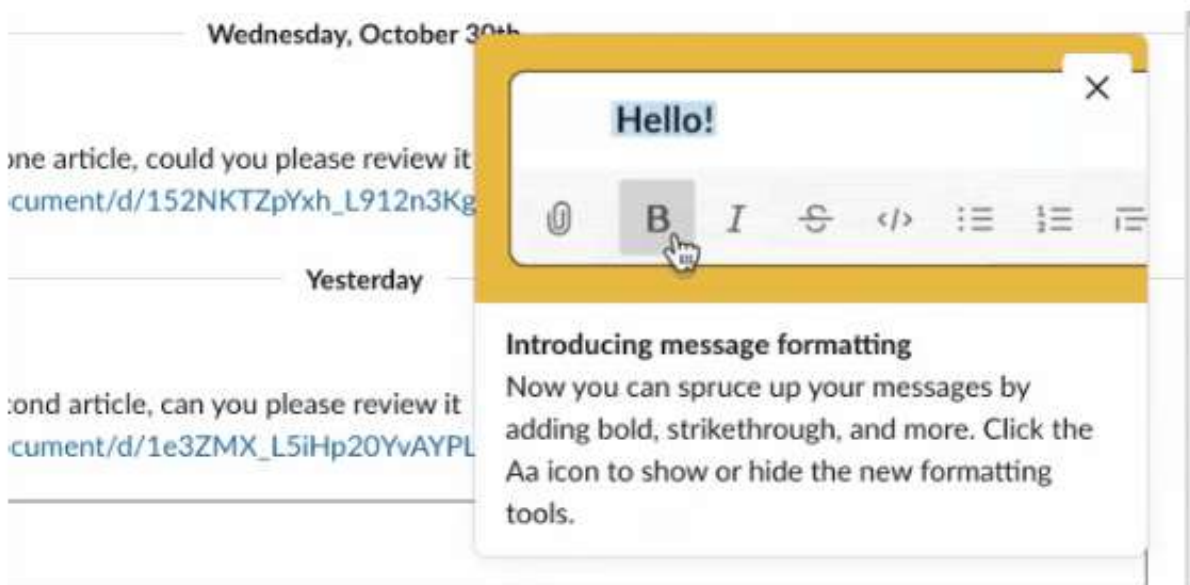




# Slideout

A Slideout is a type of pop-up window used for providing [Contextual Help](#). Unlike a [Modal](#) it does not disable the main window and permits users to keep working without dismissing it.

Here is an example of a Slideout Slack used to promote a new feature launch.







# Tertiary Onboarding

Tertiary Onboarding is all about turning your regular users (Paid Users, Basic Users) into Pro/Power Users and, ultimately, [Advocates](#).

That is, getting them so invested in your service that:

- They help spread the word through Referrals
- They are actively involved in product development through feedback – whether through NPS surveys, Microsurveys, or more detailed channels and product communities

Tertiary Onboarding tends to be much more focused on the individual user's needs and one-to-one communication than other forms of onboarding.



# Time To First Value

TTFV is a metric that looks at how long it takes to [Activate](#) new users. That is, TTFV measures the efficiency of your Primary Onboarding.

When you improve (reduce) TTFV, your users see the potential return on your service faster. The faster users experience ROI, the more likely they are to keep engaging with your service instead of drifting away.

So, TTFV can provide important insights into your sales cycle, reducing churn, improving Primary Onboarding, and many other important goals.

## Upsell

Upselling is the movement of a user up from a lower pricing tier (or free tier) to a higher one – or otherwise increasing their financial commitment, for example by adding seat licenses.

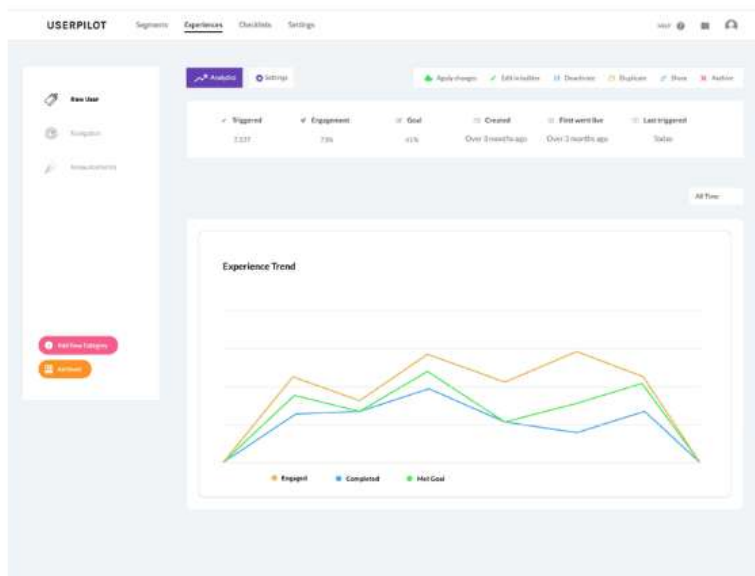
Upselling obviously impacts Revenue directly, but it's an important KPI for measuring the User Journey progress and user behavior.

In SaaS, the key to upselling is delivering more value and communicating that promise of that increased value at the higher price point.

# Usage Analytics

Usage Analytics measures how many people and how much they use your software. In quantitative terms, DAUs and MAUs are key usage metrics which can show rates of product growth over time.

But analytics becomes way more powerful when you start looking at the specifics of what users are actually doing in-app.



Once you can dig in to this level, you can begin to identify and remove pain points, to see what users value and how to improve user experiences.



# User Adoption Flywheels



A User Adoption Flywheel is a set of processes for [Adoption](#) that generate their own momentum – so that as users progress through Primary Onboarding, Secondary Onboarding, and Tertiary Onboarding, the effort required to move along the User Journey reduces.

It's not a simple process to design and build a User Adoption Flywheel, but luckily [we covered in detail in this earlier blog](#).



# User Experience

User Experience (UX) is a digital-only discipline concerned with modeling, designing and optimizing every interaction a user has with a product.

The goal of UX design is to create products that are easy to use, deliver value, and provide a pleasant experience. It incorporates the whole process of acquiring, onboarding, integrating and using those products.

That's different from UI design, which is much more narrowly about the look and feel of products.

# User Interface

The User Interface (or UI) is the means by which a user interacts with a machine. In SaaS terms, that is usually a Graphical User Interface (GUI) between users and your app.

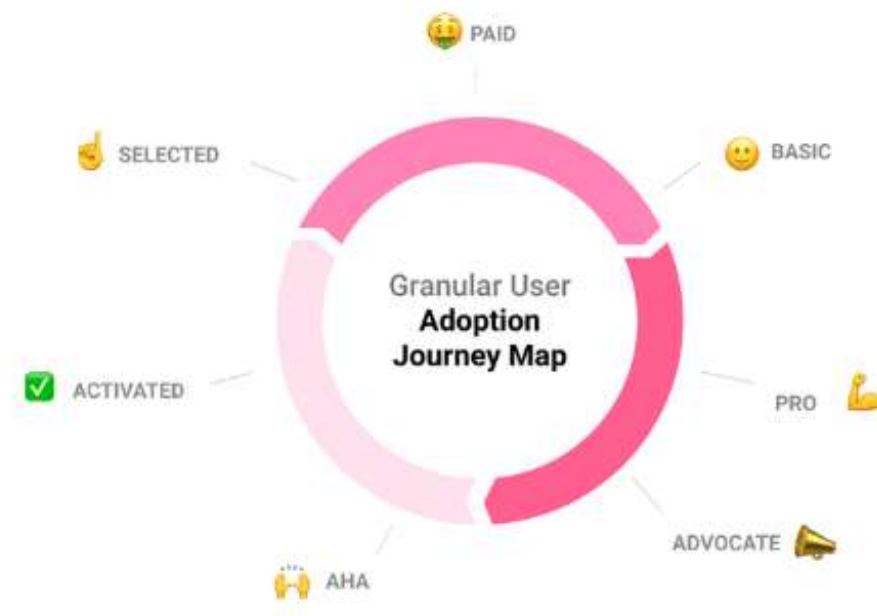
User Interface design encompasses all aspects of the look and feel of an app, including language, color, imagery and layout as well as specific points of interaction – such as [Modals](#), [Slideouts](#), [Hotspots](#), [Tooltips](#) etc.

UI is different from but connected to User Experience or UX. [Dain Miller](#) [defines the difference](#) in this way:

*UI is the saddle, the stirrups, and the reins. UX is the feeling you get being able to ride the horse.*

# User Journey

The User Journey for your SaaS is an idealized model of how you would like people to engage with and use your tool over time.



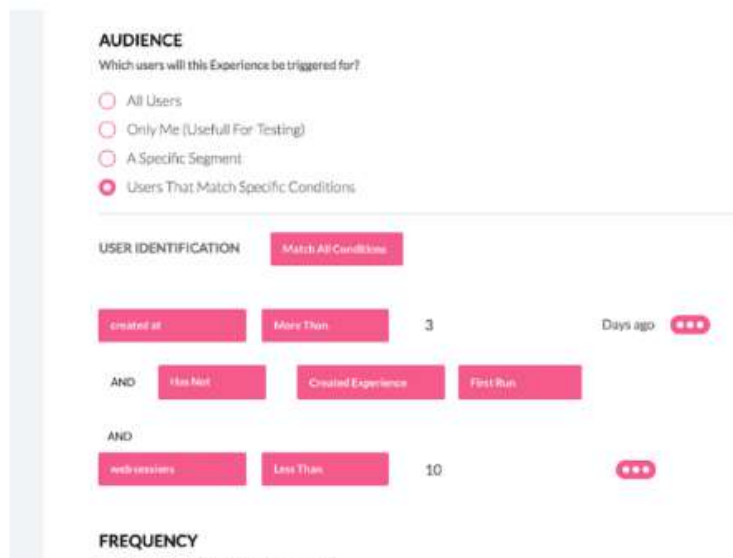
This is our version, but it can differ from business to business depending on what your product is. As users get value from your service over time, their needs change. You need to identify and cater to those needs at the right time.

The points on the diagram above represent what we believe the key milestones a user can encounter are, and we have developed strategies and tactics to help get users up to and beyond each of them.

See [Aha](#), [Activated](#), [Selected](#), [Paid](#), [Basic](#), [Pro/Power](#) and [Advocates](#) for more details.

# User Segmentation

User Segmentation is key to providing relevant and personalized in-app experiences. By identifying the needs, desires, priorities, and challenges of particular users, you can group them into segments using [Account Attributes](#).



You can start segmenting users at the Welcome Screen, during the Sign-Up Flow or even before they ever register as a user.

Ideally, you would be using at least these segments to customize the experiences users receive:

- Progress along User Journey
- Paid versus Free Users
- Known product use cases

## Welcome Screen

Your Welcome Screen is the first thing a new user sees when they first log in to your app.

It's very important for setting the tone, kicking off Primary Onboarding and helping to avoid Empty States confusion.

Welcome Screens are also ideal for collecting information for [User Segmentation](#).

The screenshot shows a user onboarding form with three radio button options for user experience level and a list of checkboxes for user goals. The second option, 'I've used social media management software in the past,' is selected with a green border. The third checkbox, 'Quickly analyze and report on social media efforts,' is also selected with a green checkmark.

<input type="radio"/> I'm new to social media management software.	<input checked="" type="radio"/> I've used social media management software in the past.	<input type="radio"/> I'm an expert at using social media management software.
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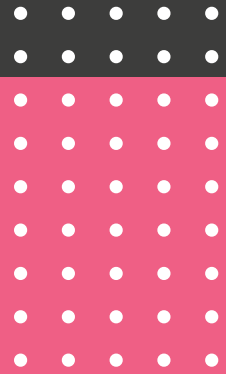
I'm here to: (Select all that apply.)

- Provide better service to my customer community
- Make my team faster and more accountable
- Quickly analyze and report on social media efforts
- Understand brand sentiment and improve my strategy


By collecting information about the user and their priorities at the very beginning of the User Journey, it is possible to deliver a more contextual, personalized and relevant overall experience.





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