

Product Marketing Challenge

Prepared for Lemlist

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Let's Start!

Task #1

Onboarding Challenge

Audit the current onboarding process of Typeform and add your comments for each of the steps. Your objective is to suggest improvements that will increase product adoption and convert more users to paid plans.

A Note

Before I begin I would like to say that I would perform a deep analysis of current paying and non paying customers.

That would help me locate exactly WHAT are the 'Aha' moments that separate paying and non-paying customers.

In most cases there are clear actions that paying customers took that contributed the most to them being paying customers.

But since there is not any data, I'm going to give suggestions based on best practices and friction points I personally had when I signed up.

Onboarding Analysis

When analysing any specific part of a user journey, it's crucial to understand the whole context behind it.

BEFORE

How did they sign up and locating friction points in registration phase.

DURING

The actual user onboarding flow.

AFTER

All touchpoints after onboarding has been completed.

Onboarding Analysis - Before

Typeform

Get better data with conversational forms, surveys, quizzes & more.

Email

Password


I agree to Typeform's [Terms of Service](#)


I accept Typeform's use of my data for the service and everything else described in the [Privacy Policy](#) and [Data Processing Agreement](#)

[See options](#)

Create my free account

OR

 Sign up with Google

 Sign up with Microsoft

Typeform

Get better data with conversational forms, surveys, quizzes & more.

! We found some errors. Please review the form and make corrections.

me@draypetrovic.com

.....

- !** At least 10 character(s)
- ✓ At least 1 number(s)
- !** At least 1 symbol(s)
- !** At least 1 lowercase letter(s)
- !** At least 1 uppercase letter(s)
- ✓ Does not contain part of username
- I agree to Typeform's [Terms of Service](#)
- I accept Typeform's use of my data for the service and everything else described in the [Privacy Policy](#) and [Data Processing Agreement](#)

[See options](#)

Create my free account

Onboarding Analysis - Before

i We found some errors. Please review the form and make corrections.

me@draypetrovic.com

.....

- ✓ At least 10 character(s)
- ✓ At least 1 number(s)
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- ✓ At least 1 lowercase letter(s)
- ✓ At least 1 uppercase letter(s)
- ✓ Does not contain part of username

I agree to Typeform's [Terms of Service](#)

I accept Typeform's use of my data for the service and everything else described in the [Privacy Policy](#) and [Data Processing Agreement](#)

[See options](#)

Get useful tips, inspiration, and offers via e-communication.

Yes No

Tailor Typeform to my needs based on my activity. See [Privacy Policy](#)

Yes No

Enrich my data with select third parties for more relevant content. See [Privacy Policy](#)

Yes No

You can update your preferences in your Profile at any time

Create my free account

Typeform

We sent an email to **me@draypetrovic.com**. Check your inbox to activate your account.

Typeform

You're almost on Typeform!

Hi there,

Just click the button and start making glorious forms. If you got this email by mistake, ignore it and have a nice day.

This button expires in 7 days. Didn't ask for this email? Just ignore me.

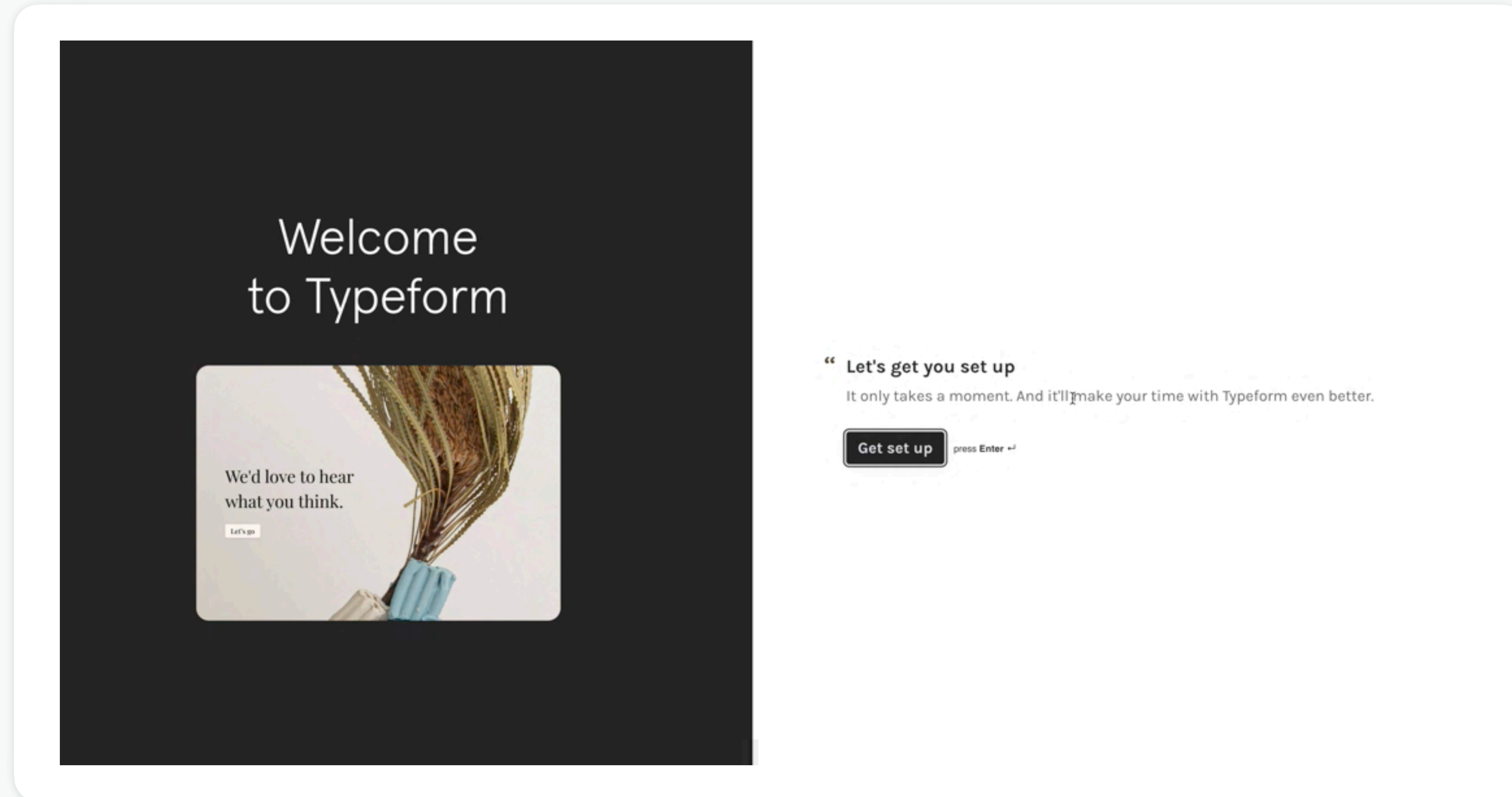
Activate my account

Onboarding Analysis - Before

- UI can be tested and improved
- I would start as simple as possible - only asking for what I absolutely need - which is their email.
 - Password is not required at this step since it can be automatically generated or asked at different stage.
 - I would consider asking for their name for purposes of personalization for Onboarding.
- The 'Options' item can be the one that causes the most friction in this process.

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- I would analyse how long the signing up process took, and take that data point and feature it above the form.
 - Feature logos of big companies using the product as well as very short supporting testimonial.
 - Add individual verification for each step. (a successful input would result in checkmark or similar)

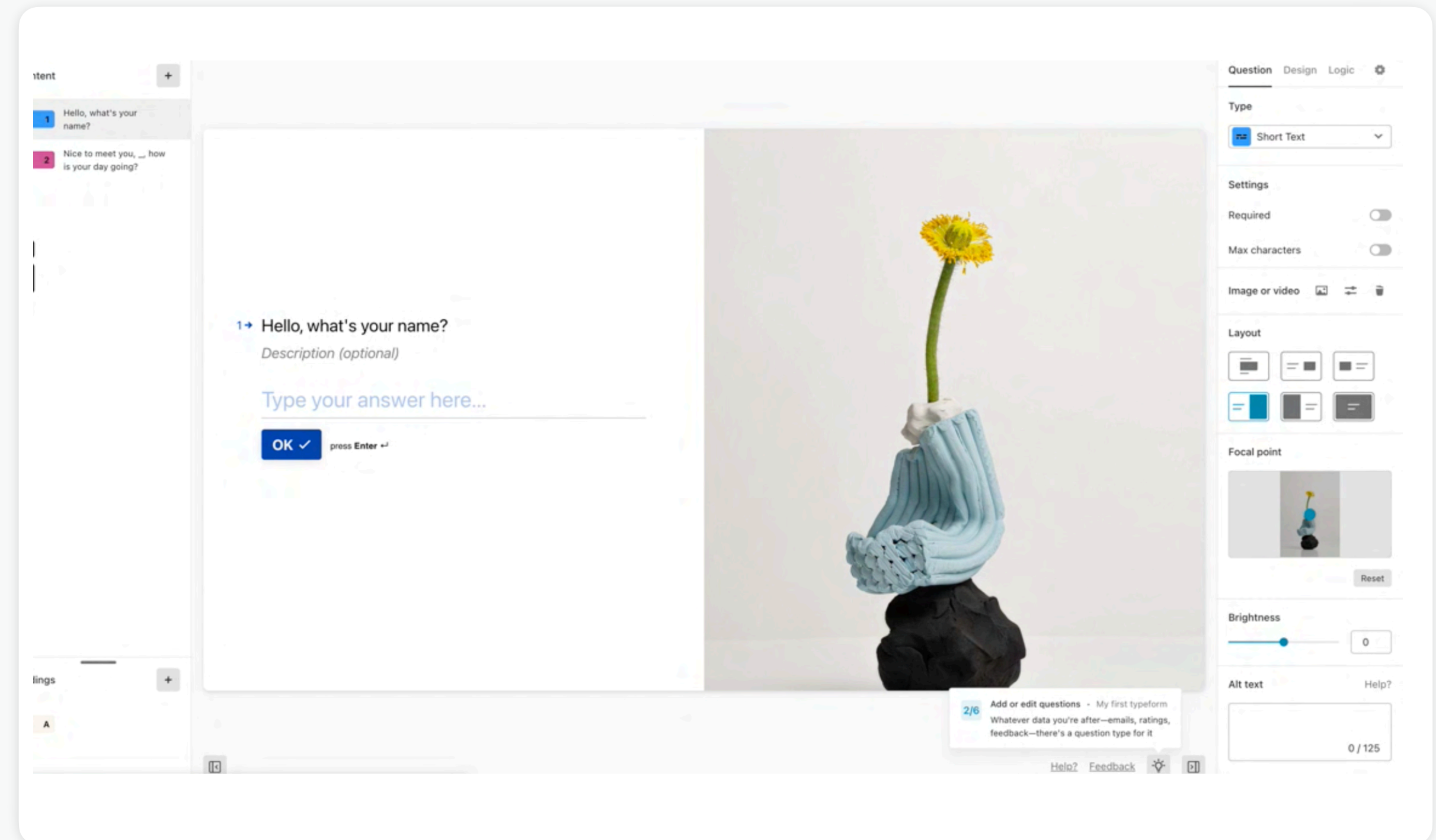
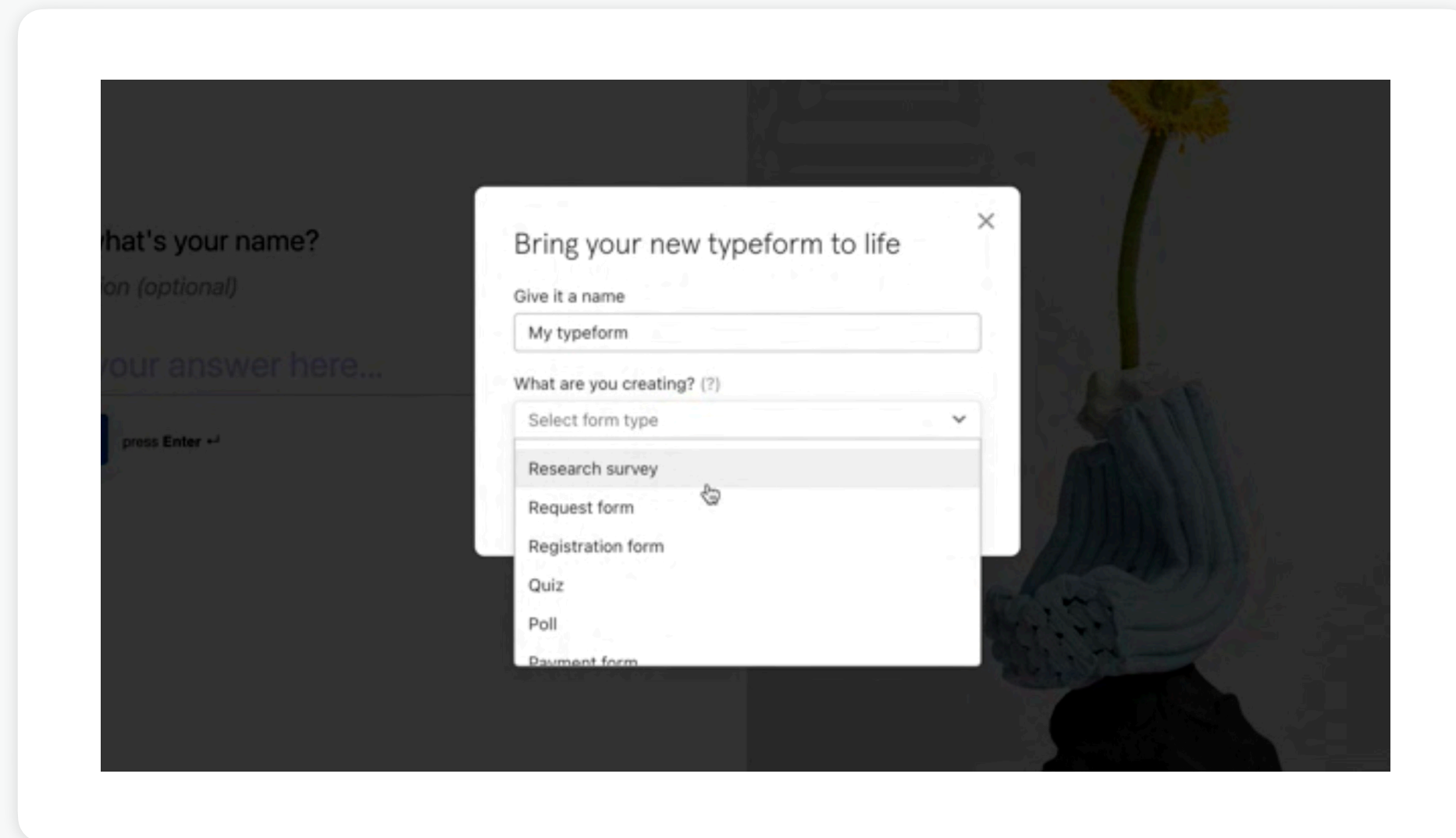
Onboarding Analysis - During



Onboarding Analysis - During

The screenshot displays a 'Template gallery' interface. On the left is a vertical navigation menu with categories: Research, Feedback, Lead capture, Registration, Quiz, Application, Order, Poll, Report, Request, Giveaway, and Other. The main content area features two buttons at the top: 'Start from scratch' and 'Import form'. Below these is a search bar with the placeholder text 'Search for a template (like feedback or lead generation)'. The templates are organized into two sections: 'RESEARCH' and 'FEEDBACK'. The 'RESEARCH' section contains four templates: 'Demographic Survey Questionnaire Template', 'Political Survey Template', 'Market Research Survey Template' (titled 'SUMMER CLUB'), and 'Brand Awareness Survey Template' (titled 'PEONY'). The 'FEEDBACK' section contains twelve templates: 'Employee Evaluation Form Template', 'Employee Engagement Survey Template' (titled 'EMPLOYEE SURVEY'), 'Self Evaluation Form Template', 'Employee Benefits Survey Template' (titled 'Sunrise App'), 'Candidate Experience Survey Template', 'Product Feedback Survey Template' (titled 'Product SURVEY'), 'Customer Feedback Form Template' (titled 'WAVES'), 'Course Feedback Survey' (titled 'COURSE FEEDBACK'), 'Post Event Survey Feedback Template' (titled 'event survey'), 'Exit Survey Template' (titled 'EXIT Interview'), 'Website Feedback Survey' (titled 'WEBSITE'), and 'Employee Satisfaction Survey Template' (titled 'ESS').

Onboarding Analysis - During



Onboarding Analysis - During

The screenshot shows a survey editor interface. At the top, there's a breadcrumb 'My workspace / Demographic Survey DEMO2 (copy)' and navigation tabs 'Create', 'Connect', 'Share', and 'Results'. On the right, there are 'Publish' and 'View plans' buttons. A left sidebar titled 'Content' lists seven survey questions with status icons (checkmarks, star, and dropdowns). The main area displays a 'Welcome Screen' with a blue background, a clipboard icon, and the following text: 'Skydale Music School | Demographic Survey', 'For us to apply for funding for the upcoming year, we need to provide the local council with the demographics of our students.', and 'It would be great to get this funding so we can start construction on our new performance hall. Will you help us by filling in a few (totally anonymous) questions?'. A 'Yes, I'll help' button is at the bottom, with a 'press Enter ↵' hint and a 'Takes X min' indicator. The right sidebar shows settings for the 'Welcome Screen' type, including 'Time to complete (?)' (toggle on), 'Button' text 'Yes, I'll help' (14 / 24 characters), 'Image or video' options, 'Layout' grid options, and an 'Alt text' field (0 / 125 characters).

Onboarding Analysis - During

Typeform

1. Choose a plan 2. Payment 3. Confirmation

Monthly Yearly Save 16% Currency GBP

Plan	Price (GBP/month)	Responses	Users	Key Features
Business	79	10k (up to 50k)	5	Drop-off rates, Priority support, Live chat
Plus	49	1k (up to 2.5k)	3	Remove Typeform branding, Custom subdomain
Basic	25	100 (up to 750)	1	Accept payments, Receive file uploads, Respondent email notifications
Free	0	10	1	

Your current plan

Your new plan

Business (monthly)	79 GBP
10,000 responses/mo	
5 users	
Total (excl. tax)	79 GBP

Continue

How many responses a month do you need?

10k 15k 25k 50k >50k

A response is counted when someone submits your Typeform. We'll email you well before you reach your plan's response limit, and you can adjust how many responses your plan includes whenever you need.

Need a custom solution? [Contact our sales team](#)

See all features ↑

Business Plus Basic Free

Onboarding Analysis - During

1. Choose a plan 2. **Payment** 3. Confirmation

Payment method

Name on card*

Card number* Expiry date* CVC / Security code*

Billing details

Name or company*

Address*

Country* City* Postal Code*

Your new plan

Business (monthly)	79 GBP
25,000 responses/mo	120 GBP
5 users	
Total (excl. tax)	199 GBP

Coupon code

Onboarding Analysis - During

- The initial form is too long and asking for too much information. (8 steps)
 - This can be biggest drop off point, but I understand if they did it purposely so they would filter the users.
- After it's finished I'm taken to a dashboard, but since I'm a new customer I'm not aware of UI and there are too many options to choose from. Even the biggest CTA - Create form, gets lost in the sea of different options.
- I would add a live chat bubble that would show after 3 minute mark.

- There are **no tool tips or walkthroughs**. (Not for 'New Form' nor for a template)
- I would add a mix of onboarding checklist and interactive walkthrough to help new users learn the UI and get comfortable using the software.
- 'View Plans' page is missing crucial conversions points in regards to Trust, Stimulance and Security.

Onboarding Analysis - After

I don't have enough information for this stage.
But in a general sense I would:

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- Setup a activity-based (Behavioural)
30 day Email Campaign
 - Omnichannel retargeting with an angle of showing
the most important benefits and features.