

simplifying the “onboarding”

User Experience

situation:

Simplify the Yesware onboarding process by minimizing existing roadblocks that prevent users from more easily doing so.

tasks:

1. Identify MVP information required to register.
2. Identify existing blockers.
3. Design a more streamlined experience that condenses the existing 5 click process into 1.

actions:

1. Research what information logging in with a Google, Facebook, etc. provides Yesware with what its needs to create a new account.
2. Review existing experience to identify what data fields are not immediately needed (i.e. data that can be gathered later).
3. Design an MVP that simplifies the process by minumizing the amount of data the user initially has to enter.

results:

...

table of contents

1. Existing user experience:

Information Architecture (i.e. 30,000 foot view)

Individual screens experience (i.e. A ground level view)

2. Existing user experience... simplified:

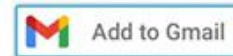
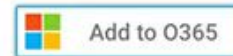
A single screen experience

existing user experience

- Currently, users can log in via their existing Microsoft 360, Gmail or Yesware account.
- Additionally, first time users can also create a new, Yesware-only account if they do not already have one.



**Simply choose your email client
below to start your free trial!**



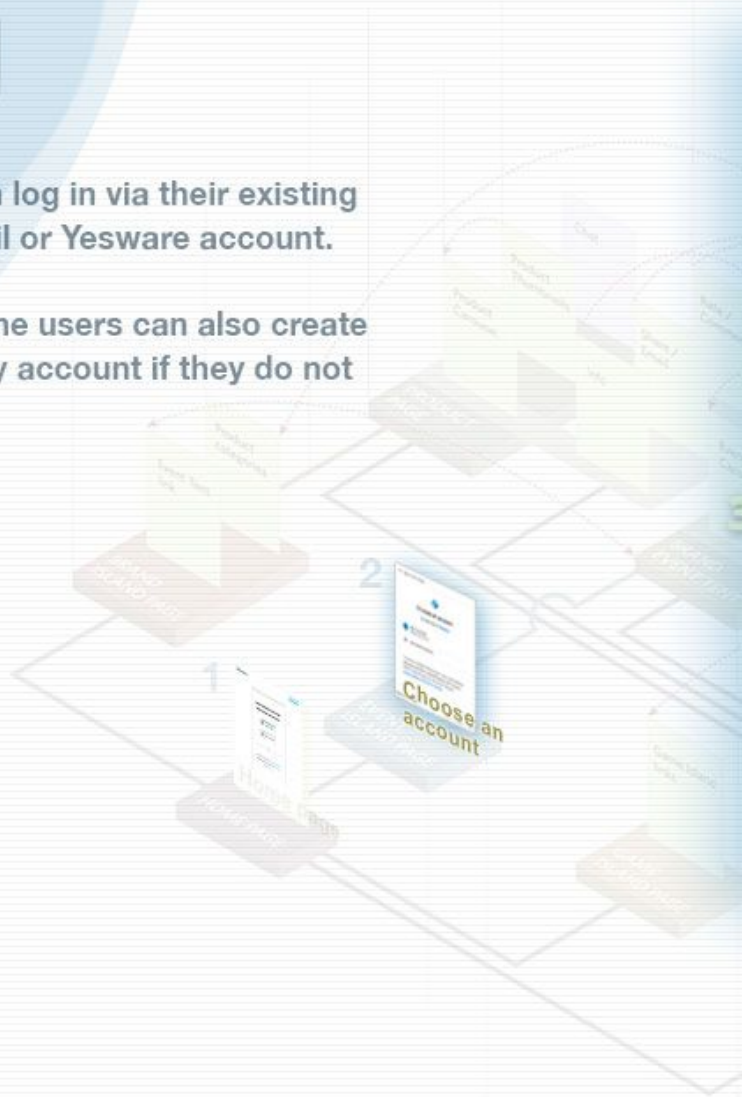
OR


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By clicking either button you agree to our [Terms of Service](#).
[View our Privacy Policy](#).

existing user experience

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 Sign in with Google



Choose an account

to continue to **Yesware**

 Alan Turransky
alan@turransky.com

 Use another account


To continue, Google will share your name, email address, language preference, and profile picture with Yesware. Before using this app, you can review Yesware's [privacy policy](#) and [terms of service](#).

existing user experience

- Currently, users can log in via their existing Microsoft 360, Gmail or Yesware account.
- Additionally, first time users can also create a new, Yesware-only account if they do not already have one.






Sign in with Google



Yesware wants to access your Google Account

alan@turransky.com


This will allow Yesware to:

-  View your email messages and settings ⓘ
-  Manage drafts and send emails ⓘ
-  View and edit events on all your calendars ⓘ

existing user experience

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Help us improve your experience with Yesware
by sharing a few more details:

1. In which department or field do you work? *

Customer Success / Account Management	Marketing	Sales
Services / Customer Support	HR / Recruiting	Entrepreneur / Founder / Investor
Other		

2. Which of the following best matches your role? *

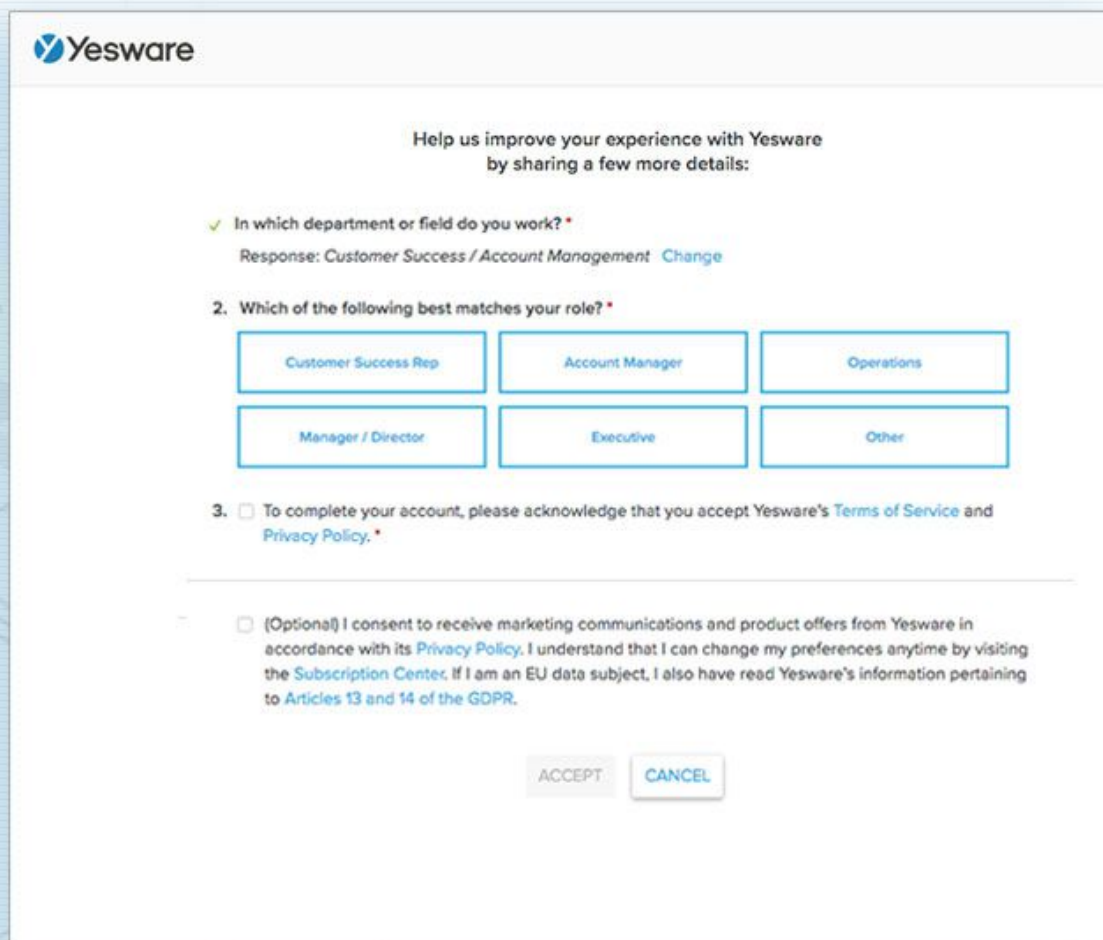
3. To complete your account, please acknowledge that you accept Yesware's [Terms of Service](#) and [Privacy Policy](#). *


(Optional) I consent to receive marketing communications and product offers from Yesware in accordance with its [Privacy Policy](#). I understand that I can change my preferences anytime by visiting the [Subscription Center](#). If I am an EU data subject, I also have read Yesware's information pertaining to [Articles 13 and 14 of the GDPR](#).

ACCEPT CANCEL

existing user experience

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 Yesware

Help us improve your experience with Yesware
by sharing a few more details:

In which department or field do you work? *
Response: *Customer Success / Account Management* [Change](#)

2. Which of the following best matches your role? *

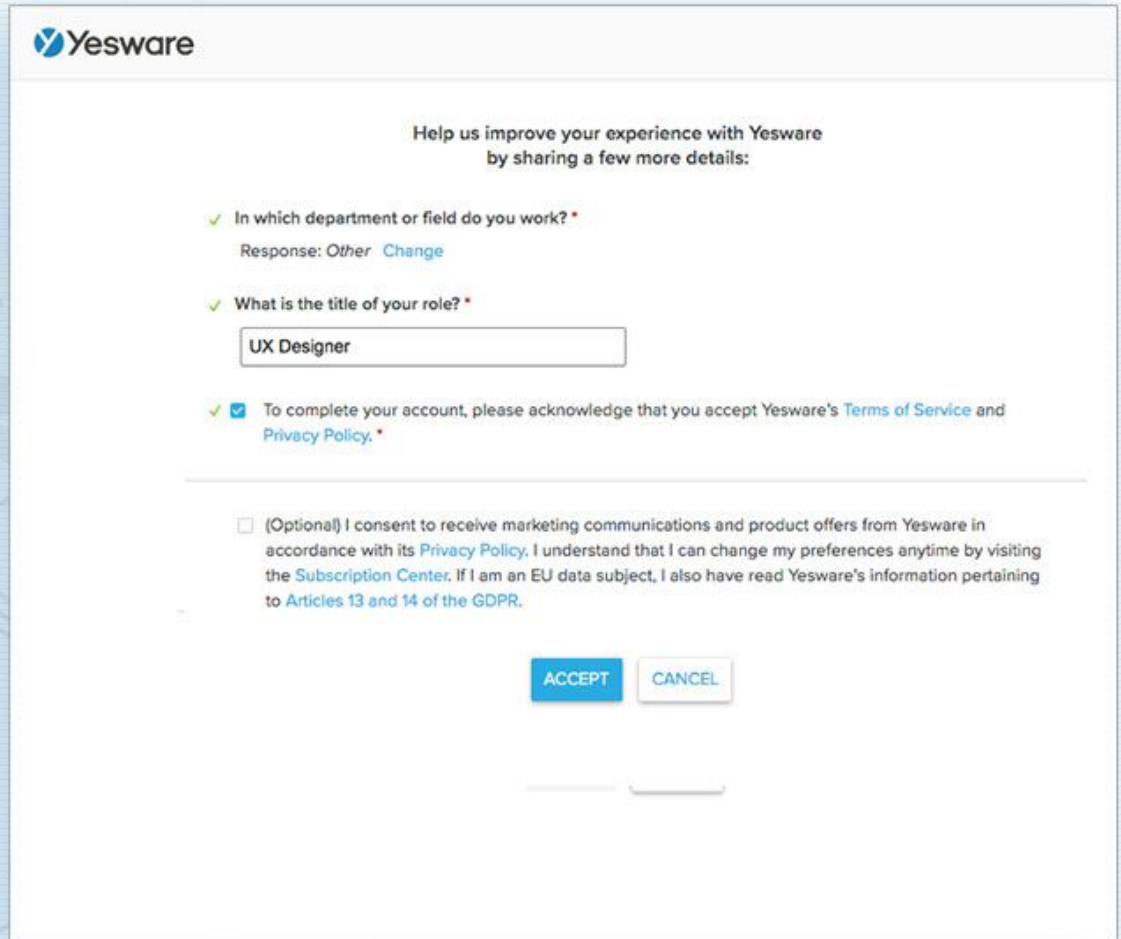
Customer Success Rep	Account Manager	Operations
Manager / Director	Executive	Other

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Yesware

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by sharing a few more details:

✓ In which department or field do you work? *
Response: *Other* [Change](#)

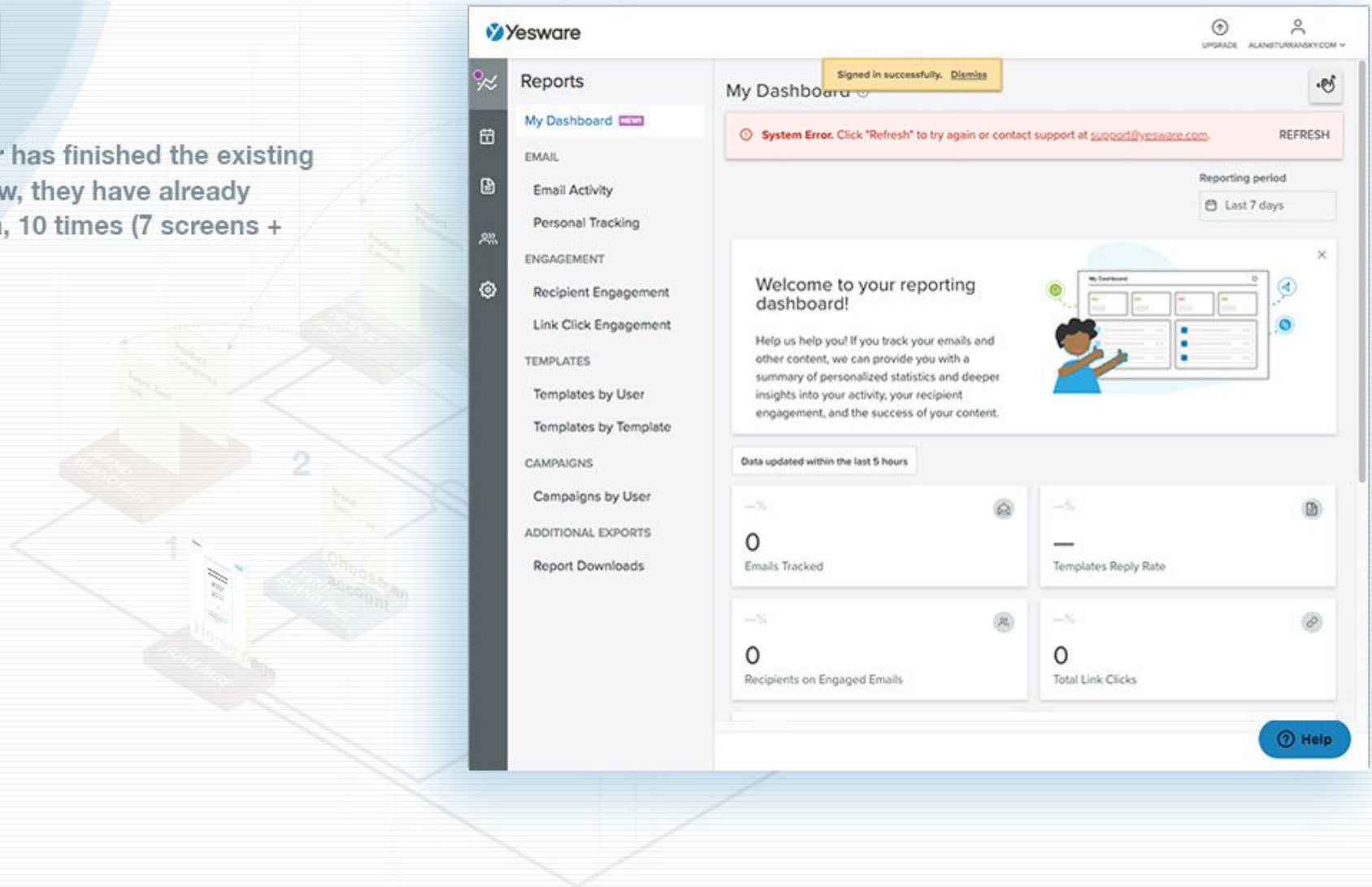
✓ What is the title of your role? *

✓ To complete your account, please acknowledge that you accept Yesware's [Terms of Service](#) and [Privacy Policy](#). *

(Optional) I consent to receive marketing communications and product offers from Yesware in accordance with its [Privacy Policy](#). I understand that I can change my preferences anytime by visiting the [Subscription Center](#). If I am an EU data subject, I also have read Yesware's information pertaining to [Articles 13 and 14 of the GDPR](#).

existing user experience

- By the time the user has finished the existing registration workflow, they have already clicked, at minimum, 10 times (7 screens + 3 required fields).



- Present the user with a single screen experience that dynamically loads required data fields as needed.
- Remove any current data entry points that can be gleaned later once the user has access to the Yesware dashboard.



Hello!

To access Yesware's full suite of tools, log in with your existing:

▶ [Google](#), [Microsoft 360](#), or [Yesware](#) account.

If you do not already have one, you can also create a Yesware account simply by entering your email:

▶ [Log into Yesware with your email.](#)


- Present the user with a single screen experience that dynamically loads required data fields as needed.
- Remove any current data entry points that can be gleaned later once the user has access to the Yesware dashboard.



Hello!

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 Alan Turransky
alan@turransky.com

 Use another account

This will allow Yesware to:

 View your email messages and settings



 Manage drafts and send emails



ACCEPT

CANCEL

- Once the user is registered and logged in, offer them opportunities to customize their experience.

The screenshot shows the Yesware reporting dashboard. At the top left is the Yesware logo. In the top right corner, there are links for 'UPGRADE' and 'ALAN@TURBANSKY.COM'. A left-hand navigation menu is visible, containing sections for 'Reports', 'My Dashboard' (with a 'NEW!' badge), 'EMAIL' (with sub-items 'Email Activity' and 'Personal Tracking'), 'ENGAGEMENT' (with sub-items 'Recipient Engagement' and 'Link Click Engagement'), 'TEMPLATES' (with sub-items 'Templates by User' and 'Templates by Template'), 'CAMPAIGNS' (with sub-item 'Campaigns by User'), and 'ADDITIONAL EXPORTS' (with sub-item 'Report Downloads').

The main content area features a 'Welcome to your reporting dashboard!' message with an illustration of a person interacting with a dashboard. Below this is a role selection section titled 'Which of the following best matches your role? *' with six buttons: 'Customer Success Rep', 'Account Manager', 'Operations', 'Manager / Director', 'Executive', and 'Other'. A status bar indicates 'Data updated within the last 5 hours'. Below this are four data cards, each with a percentage indicator and a refresh icon. The first card shows '0 Emails Tracked'. The second card shows '— Templates Reply Rate'. The third and fourth cards are partially visible and show '0'.

- Once the user is registered and logged in, offer them opportunities to customize their experience.

Which of the following best matches your role? *

Customer Success Rep	Account Manager	Operations
Manager / Director	Executive	Other

Yesware

UPGRADE ALAN@TURBANSKY.COM

Reports

My Dashboard **NEW**

EMAIL

Email Activity

Personal Tracking

ENGAGEMENT

Recipient Engagement

Report Downloads

Welcome to your reporting dashboard!

Help us help you! If you track your emails and other content, we can provide you with a summary of personalized statistics and deeper insights into your activity, your recipient engagement, and the success of your content.

Which of the following best matches your role? *

Customer Success Rep

Account Manager

Operations

Manager / Director

Executive

Other

Data updated within the last 5 hours

0 Emails Tracked

— Templates Reply Rate