### **Abstract and Intro**

Analysing the onboarding best practices as well as common pain points can help create an positive user experience.

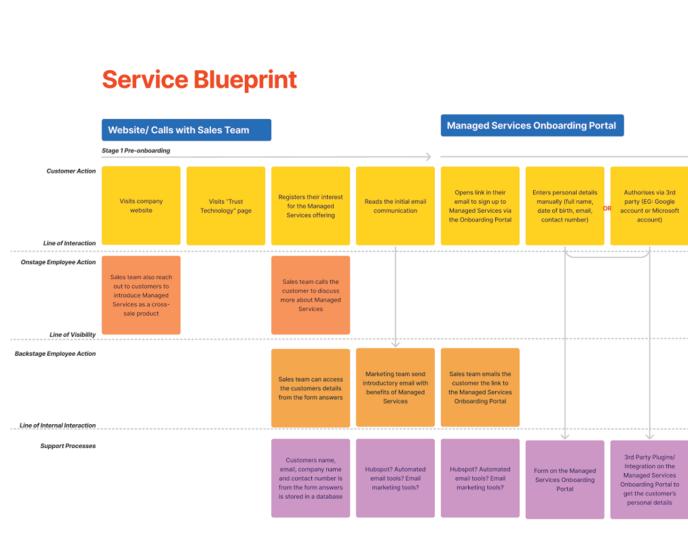
Primary and Secondary research highlights the key features of successful onboarding and using this I have narrowed down the features needed for a B2B user onboarding to a SaaS product.

## **Testing & Evaluation, Research Results**

Wireframes tested using "first click testing" to ensure it is usable. Mockups tested using unmoderated usability testing to ensure that users can navigate easilty and complete the onboarding.

Main results were that CTA needs to be more obvious and navigation bar is missing.







## **Service Blueprint**

# What are the fundamental principles that govern the successful onboarding of B2B customers of SaaS facilities and how can they be deployed to ensure a remarkable user experience?



Primary research in the form of 3 online questionnaires all aimed at finding out about users experiences for different products and services. Secondary research focussed on a literature review of research done on best practices for B2C and B2B users.

## **Future Work**

Conduct more research on how location can impact the users needs and whether there is an advantage to having different onboarding processes for different locations or one standardised process.

| Users<br>Video Player<br>Add users<br>Play recorded videos<br>Edit users<br>Delete users<br>Share videos |           |                                       | d Services<br>ling Portal |               |
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| Users Video Player Add users Play recorded videos Edit users Share videos                                |           |                                       |                           |               |
| Edit users<br>Share videos   |           | sers                                  |                           | eo Player     |
| Edit users<br>Share videos   |           |                                       |                           |               |
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checks that the company is legit sucl as UK GOV website Onboarding portal interface is updated with a timer for the

Status of the checks is shown on interface (approved or not approved)

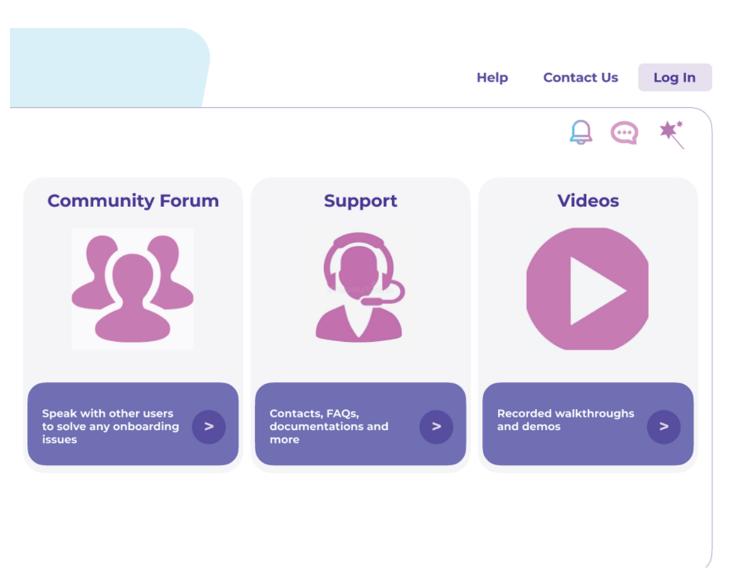


Wireframes



Site Map







Mockups