

Worksheet: Optimize Your Time-To-Value .

1 Identify User Success

Start with identifying the answers to these questions:



What are the main functional, social, & emotional jobs that your product solves for?



How do you help users level up?



What is the first “strike” for new users?



How do you define user success for your product?

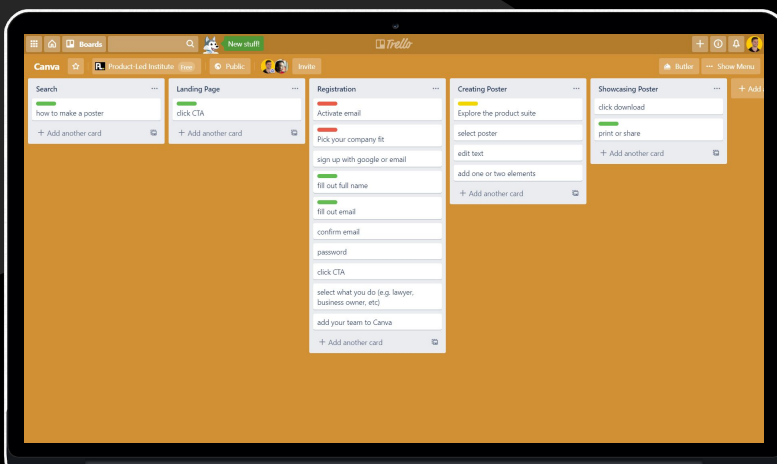


2 Map Out The User Journey

Write down every single step from the first touch point with your brand to the moment your user experiences success in your product.

This could be built out using [Trello](#), sticky notes, or any other tool you see fit.

*For best results, do this activity individually, even if you're taking this program with your team.



3 Vet Every Step

Once you've mapped out your entire onboarding process, ask yourself these three questions:



01

What steps can be eliminated?
(i.e. Unnecessary form fields & email activation steps)



02

What steps can we delay? (i.e. Advanced features)



03

What are the mission-critical steps? (i.e. Our product won't work without this step)

Based on your responses to the questions above, start labelling every step with the colors below:



Green light indicates that we absolutely must keep the step.



Yellow light indicates that it's an advanced step that can be introduced at a later point.



Red light indicates that a step can be eliminated without hurting the onboarding experience.

*If you're using posted notes for this process, just use



for green lights



for yellow lights



for red lights

4 Develop Your Straight-Line Onboarding Experience

By now you should know exactly what the mission critical steps are for someone to experience the value of your product.

But, you're just basing this off of your opinion. To get the best results, get someone from your product, marketing, sales, engineering, and success team to go through this activity with you.

Have them identify what they deem as unnecessary, advanced, and mission-critical steps. This should get an engaging conversation going as you might not see eye-to-eye on every step which is completely fine. Some steps might be necessary for lots of reasons you weren't initially aware of. You might also find that you need to add some steps that weren't initially on the list. That's fine too!

Your goal is to develop a straight-line onboarding experience that accelerates your user's time-to-value. Here's an example of what that might look like:

