Onboarding

Brief Overview

The Onboarding App lets you create a list of tasks for your user to complete. Tasks are Walk-Thrus or video or article Resources. Onboarding Tasks enables users to see their progress as they move through the tasks, gamifying the experience and pushing them to complete more Tasks and engage with WalkMe.

The Onboarding App can be used to create a checklist for training purposes, improving conversion rates of free users to paid, or speeding product adoption.

Use Cases

Accelerate Training
Give users a clear and straightforward path to complete training. For example, create a task list with all tasks necessary for a new employee to get started such as creating a profile, reading about company policies, signing up for HR benefits, and setting up an expense account.

Improve Conversion
End customer confusion and make your product attractive and simple. For example, create a checklist that shows off your product's features and drives customers to action.

Promote Product Adoption
Enhance the customer experience and increase loyalty by boosting engagement with your site. For example, create a checklist that takes the user through all the necessary processes to get started.
Tasks in an Onboarding list are made using Walk-Thrus or Resources you have already created. In the Onboarding App, you can add a Walk-Thru as a task with a different name than what it is called in the Player Menu. When creating your task, you can Segment it to appear to selected audiences, set Activation Rules so it appears only after another process has been completed, and set goals to determine when the task will be considered complete.

How It Works

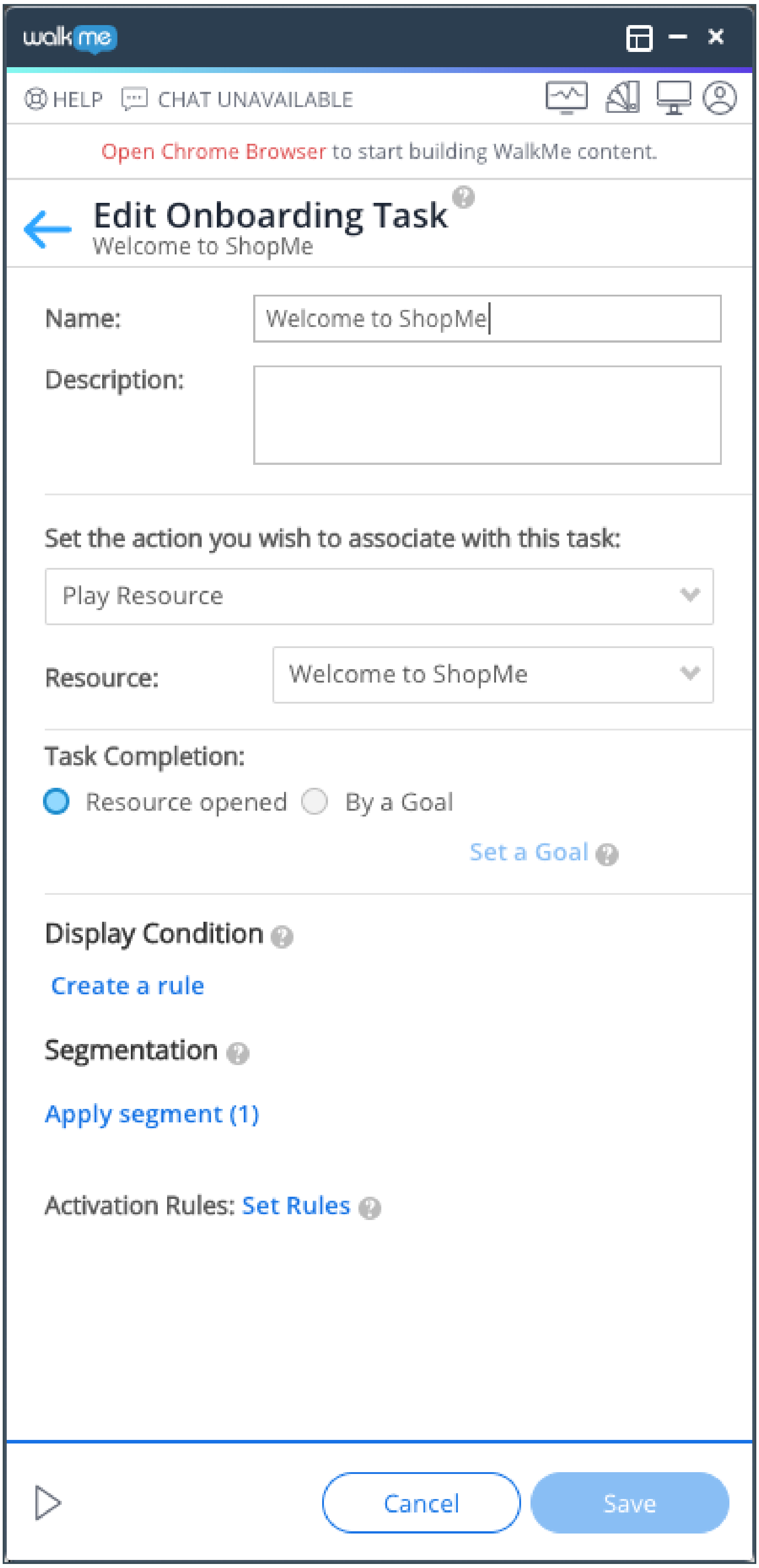
Tasks in an Onboarding list are made using Walk-Thrus or Resources you have already created. In the Onboarding app, you can add a Walk-Thru as a task with a different name than what it is called in the Player Menu. When creating your task, you can segment it to appear to selected audiences, set Activation Rules so it appears only after another process has been completed, and set Goals to determine when the task will be considered completed.

The Onboarding Tasks list appears in the Player Menu in a separate tab from your other Walk-Thrus, Resources, and Shuttles. When the user clicks a task, WalkMe will launch the associated Walk-Thru or Resource.

As each task is completed, the user's progress will be updated in the progress bar. You have the option to strike out tasks after completion and allow playback if desired. When designing your Tasks List UX, we recommend the following best practices:

- Set tasks to be crossed off in the Tasks List after completion if the tasks are one-time actions;
- Gray out tasks that are not yet eligible to be completed due to the requirement that prior tasks be completed first;
- Condition the Tasks List not to show at all in the following circumstances:
    - You are tracking user task completion and don’t want them to know; and
    - Your users have completed all of the tasks, and they are all one-time tasks; in this case, the Tasks List becomes redundant.

When creating a task, you can add a description, Goal, Segmentation, and Activation Rule.


HELP
CHAT UNAVAILABLE
Open Chrome Browser to start building WalkMe content.
Edit Onboarding Task
Welcome to ShopMe
Name:
Welcome to ShopMe
Description:
Set the action you wish to associate with this task:
Play Resource
Resource:
Welcome to ShopMe
Task Completion:
Resource opened
By a Goal
Set a Goal
Display Condition
Create a rule
Segmentation
Apply segment (1)
Activation Rules: Set Rules
Cancel
Save

Goals

Goals are an essential part of creating a task. A task includes one Main Goal and should tie into your Key Performance Indicators. Completion of the Goal will determine when the task will appear crossed out on the task list in the Player View for the end-user. The Goal will also determine when the task will show as complete to you in Insights.

Creating a Goal

By default, the Goal will be “Walk-Thru completed” or “Resource opened” but it is recommended that you set more specific Goals for Walk-Thru tasks. That way, if the user abandons the Walk-Thru midway but still completes the task (e.g. click Save or reach a desired URL), it will be marked as complete and crossed off the Onboarding list in the end-user view.

Onboarding Goals should be created to represent that the user has completed the necessary task; for example, a specific message that appears in the process such as a completion message or URL that they will reach. Make sure you only create goals that the user will reach in the Task.

How WalkMe Checks Goals

In contrast to Walk-Thru goals which are only checked once the actual Walk-Thru is played, Onboarding goals are always checked in the background, whether or not the user even opens the widget. The task does not have to be clicked to be crossed off the task list; the task will be crossed off if the user successfully reaches the goal even if the Walk-Thru or Task was never started. This way, the Onboarding Checklist will show the user their progress even if they never engage with your Walk-Thrus.

Performance Considerations

The only time WalkMe stops checking Onboarding Goals is once they are all met. Because goals are constantly being checked in the background they can slow down WalkMe. The best practice is to use jQuery or URL, not on-screen elements. Goals-based on these Rule Types will optimize WalkMe performance on a site.

Goal Types

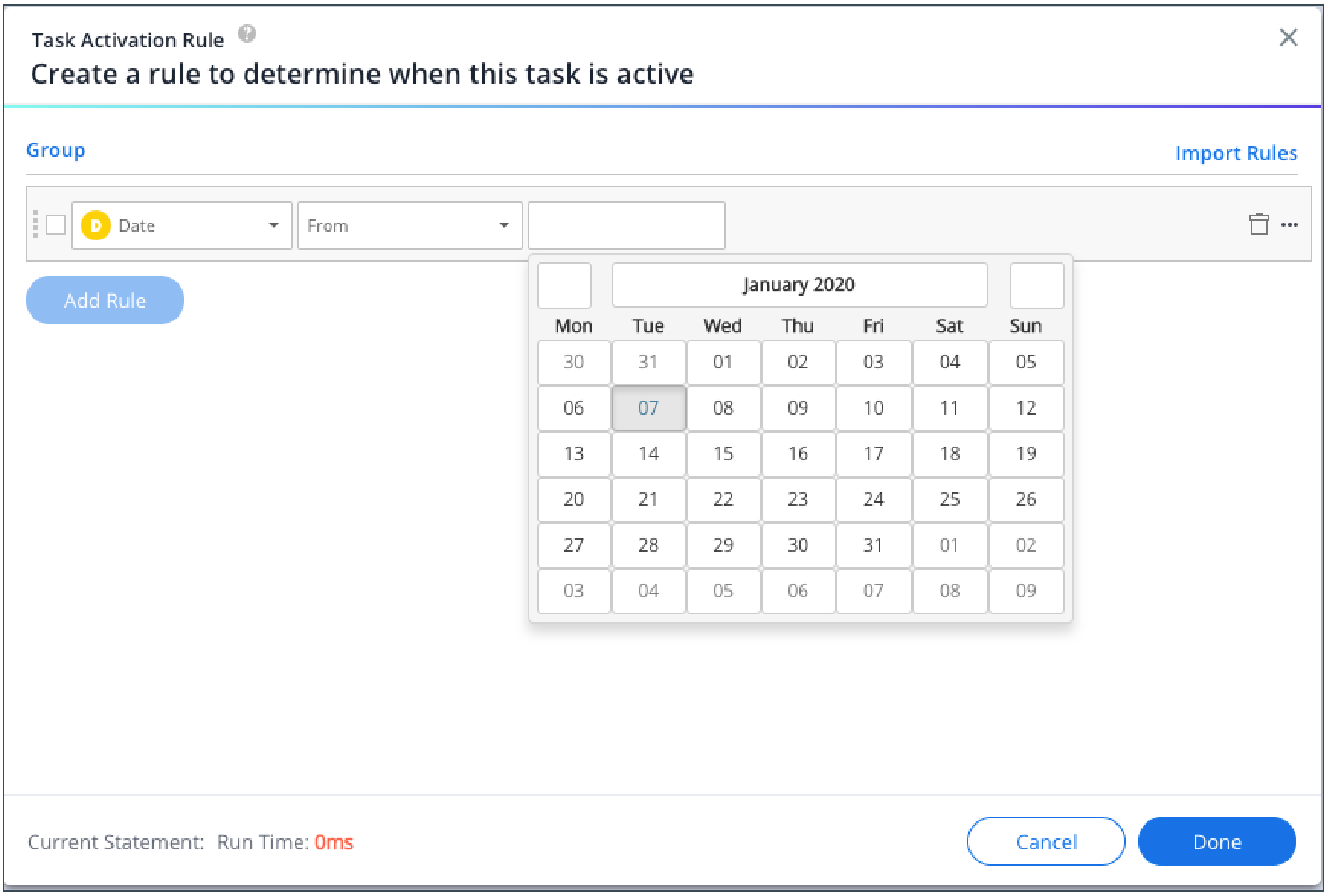
Smart Walk-Thrus include Main Goals and Milestones but tasks only have Main Goals. This is because you only need one user action that will cross the task off in the task list. If you would like greater insight into the task completion, you can create Milestones in the associated Walk-Thru. Milestones are particularly helpful to understand user behavior when Main Goals are not completed. If Analytics shows that tasks are not being completed, you can refer to the Milestones you set to determine where in the Walk-Thru users are falling off.

Activation Rules

While display segments define who will see a given task, activation rules are rules that will make a given task active/playable from the widget. You can use activation rules to ensure tasks are played in a specific order. Activation rules can be based on an on-screen element, cookie, URL, jQuery, or the other Rule Types in the Rules Engine. If you leave the Activation Rule blank, the task will be playable at any time from the widget.

Using Activation Rules allows you to limit the available Onboarding Tasks. For example, to write an email, a user must have created a username and email account before, so it doesn't make sense to allow the user to go through the onboarding in any order they want, since the overall onboarding process is linear. You could set the Activation Rule so that in order for the "Write an Email" task to be visible in the Onboarding list, the user must first create a user profile.

In the image below, the task will not be visible in the Tasks tab until the designated date:



Onboarding Settings

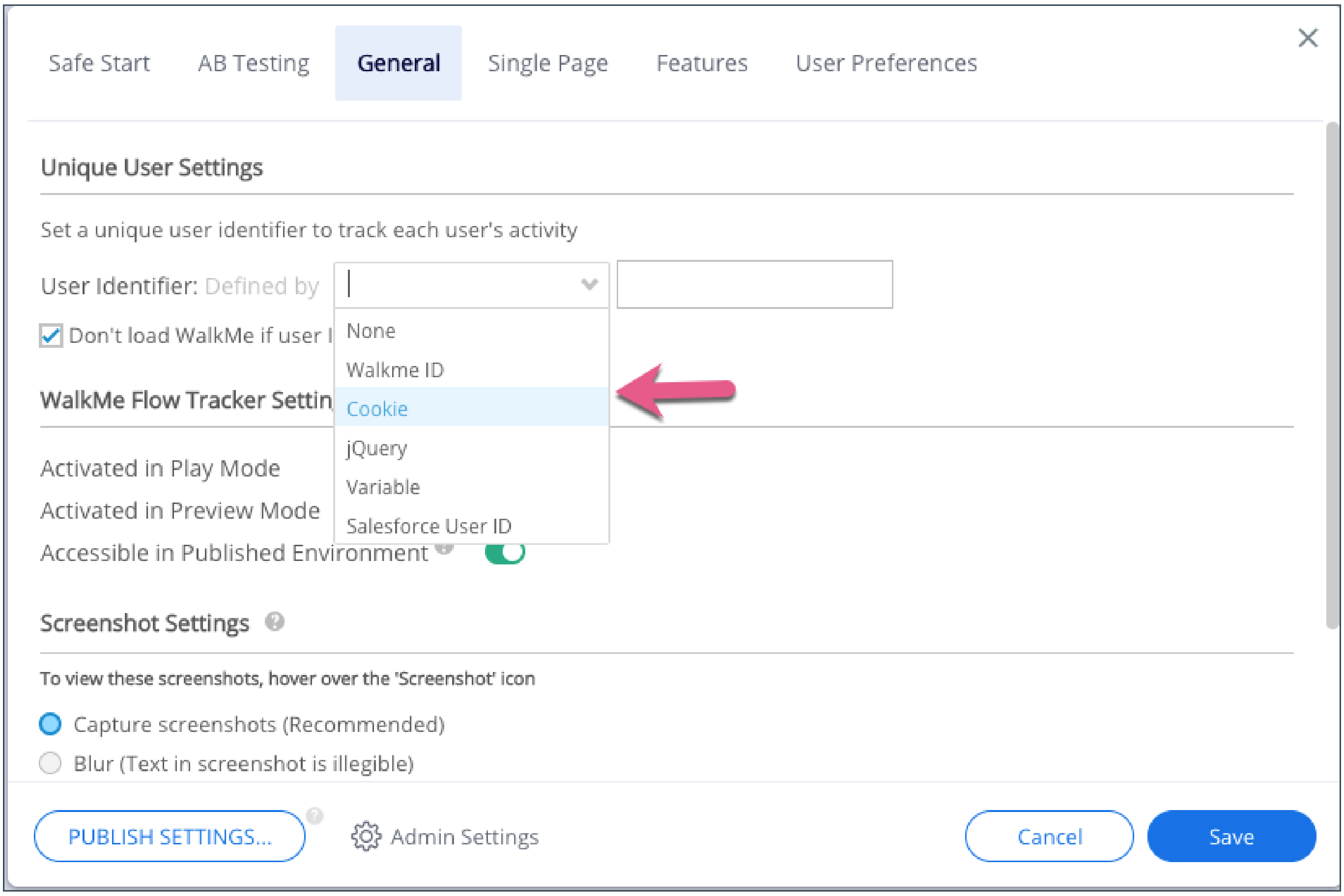
Onboarding Settings apply to all tasks created in the Onboarding App, whether they are segmented or activated to play simultaneously or not. Here you can turn the Onboarding task list on or off, select a universal segmentation, choose whether to allow users to playback after a task is completed, and set tasks to be crossed out. "Display Only

Onboarding in Menu" will remove the Help tab inside the widget and keep only the tasks tab.

You can change additional things about Onboarding within the Publish tab in the Menu Organizer including the name of the Task tab, the order in which the tasks appear in the task list, and whether the Help tab of Task tab should be the first visible tab in the end-user view.

User ID

In order to have meaningful analytics, you'll need to retrieve the user ID. The User ID enables you to personalize reporting in Analytics to see who completed which task and correlate task completion in the Analytics with an actual user.



The User ID can be defined in WalkMe Settings. The available user identifiers are:

- None - This is the default User ID and is not recommended;
- WalkMe ID - The WalkMe ID is generated via WalkMe and not optimal for collecting user information in Analytics;
- Cookie - The site sets a cookie with a unique user ID. Note: Once the user clears their cookies or uses a different browser, tasks will be reset;

- jQuery - Use jQuery selectors to identify unique user information on the site if possible. For example, an email address you can find using selectors;
- Variable - Use a JavaScript variable that correlates with a User ID. This is the most common choice for onboarding variables;
- Salesforce - Salesforce UID that will appear in Analytics as a string of random digits and letters and unless you have a way to translate this, using Salesforce for User ID will not be able to provide meaningful analytics.

Using Onboarding Task Completed As A Goal

If you have created an Onboarding Goal, you can then use that goal as a Rule Type for other conditions. For example, if you have a goal that checks to see that someone has completed setting up their user profile, you can automatically play a survey based on when that goal has been completed. Another use is a ShoutOut that encourages users to complete an Onboarding task that will play until all goals were reached.

Auto Play A Walk-Thru Or A Shoutout Based on Onboarding Goal Completion

- Create the Walk-Thru / ShoutOut, or choose an existing one from the Editor;
- Click on the Walk-Thru’s / ShoutOut’s Settings icon, and go to the Engagement tab;
- Click on “Create an Auto Play Rule”;
- Add the following rule: User Activity Onboarding Task *Select a task from the list* *Select a goal from the list* Was Reached;
- You’ll need to create the above rule for each Onboarding Task that is relevant to the user type. Make sure that the rules have “AND” logic between them;
- In the case of a Walk-Thru that you want to be played only under the conditions set in your Auto Play rule, go to the Walk-Thru's Segmentation tab and toggle the “Hide from menu” option. This way the Walk-Thru will not appear in the Player Menu and will only be accessible through the Auto Play.

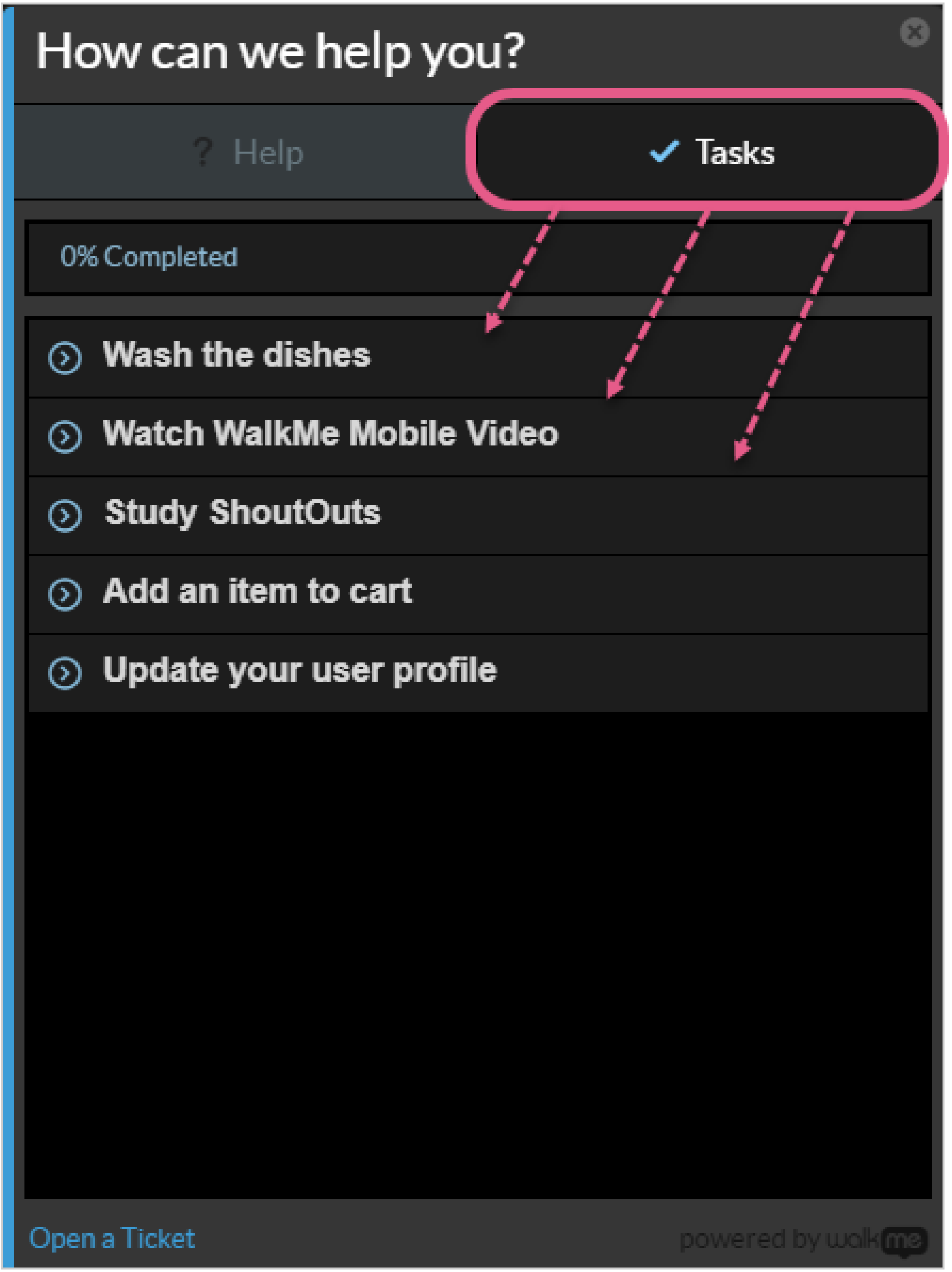
Auto Play A Survey Based On Onboarding Goal Completion

- Create the Survey, or choose an existing one from the Editor;
- Click on the Survey’s Settings icon;
- Click on “Create an Auto Play Rule”;
- Add the following rule: User Activity Onboarding Task *Select a task from the list* *Select a goal from the list* Was Reached;
- You’ll need to create the above rule for every single Onboarding Task that is

relevant to the user type. Make sure that the rules have “AND” logic between them.

The Finished Product

Here is an example of what your end-user will see once you've created a tasks list:



Try it Out

Use an existing Walk-Thru to create a task and:

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Set a Goal related to your KPIs;

- Set an Activation Rule;
- Segment the task for relevant audiences;
- Set the Task tab to be the first visible tab;
- Change the name of the Tasks tab;
- Create a ShoutOut with an Action button that will directly open the checklist.

Related Resources

- Read about Segmentation and Goals;
- Read about Variables and WalkMe Data for User ID;
- Read about Organizing the Player Menu.