

Trial Onboarding

Adding a New-User-Experience to
increase conversion

Project description

The new trial activation flow was a design-proposed, design-led, and design-executed initiative, without PM or Eng resources.

Getting buy-in was difficult, against more flashy or high-profile initiatives. It was also seen as a “competition” to the AI efforts.

While simple on the surface, the project required a lot of collaboration, compromise, and a careful approach.

Hypothesis: a human-made template will outperform gen AI

The Blank Slate Problem

ChromeFileEditViewHistoryBookmarksProfilesTabWindowHelp

mburnett.quickbase.com - Home

mburnett.quickbase.com/db/main?a=myqb

My AppsSharePoint

quickbase

Hi, Michael Burnett

My AppsPipelinesExchange Beta

Quickbase > My Apps in mburnett

My apps

Adv. search

Search apps

+

Create new app

Try Quickbase with a sample app

Get an app from Exchange to see examples of what a Quickbase app can do to help create better ways to work.

Explore sample apps

Account Admin

Manage my account

Learning and help

Community

Discussion forums for asking questions, getting answers, and learning from fellow

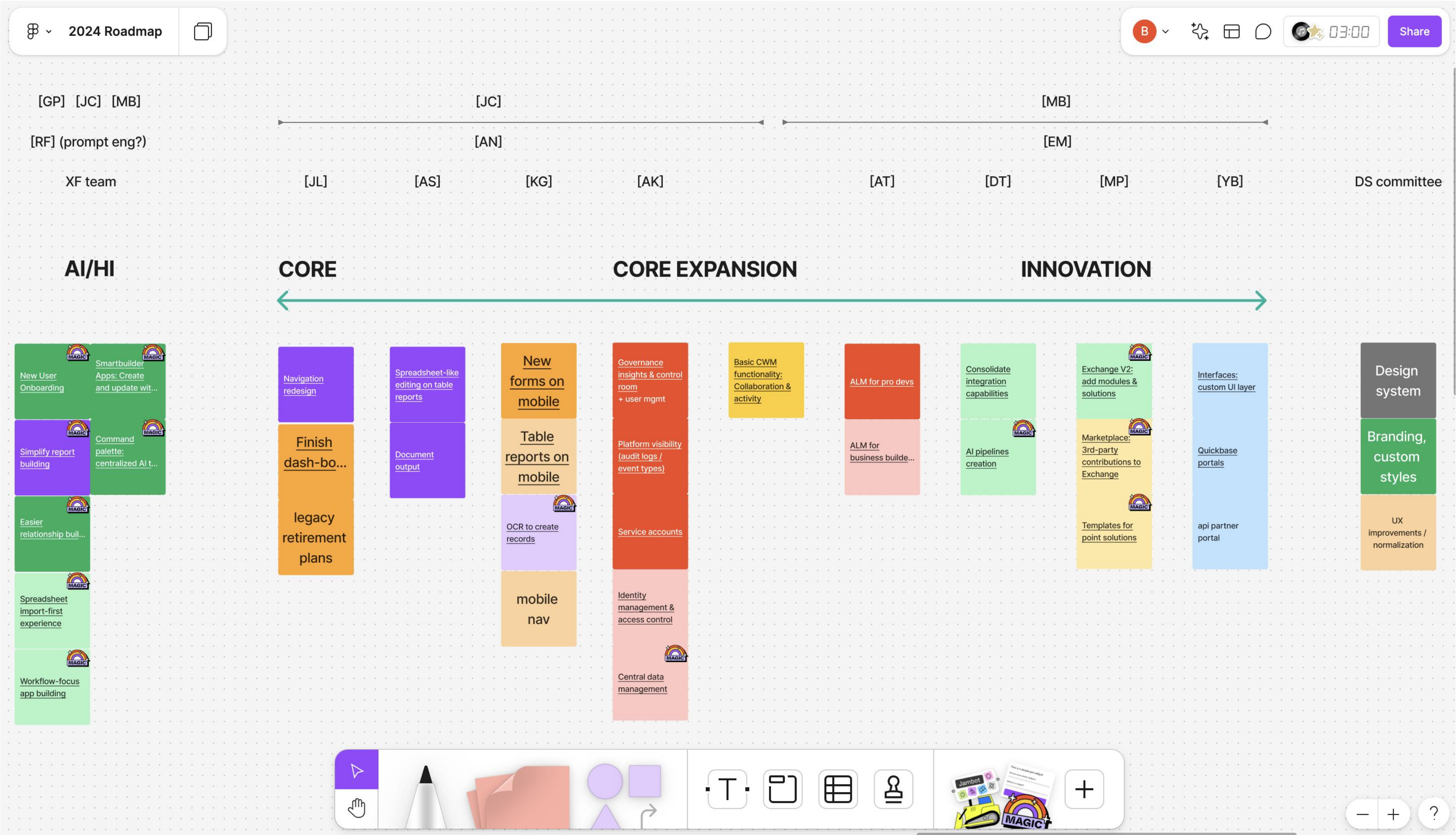
How-to videos

Quickbase Basics

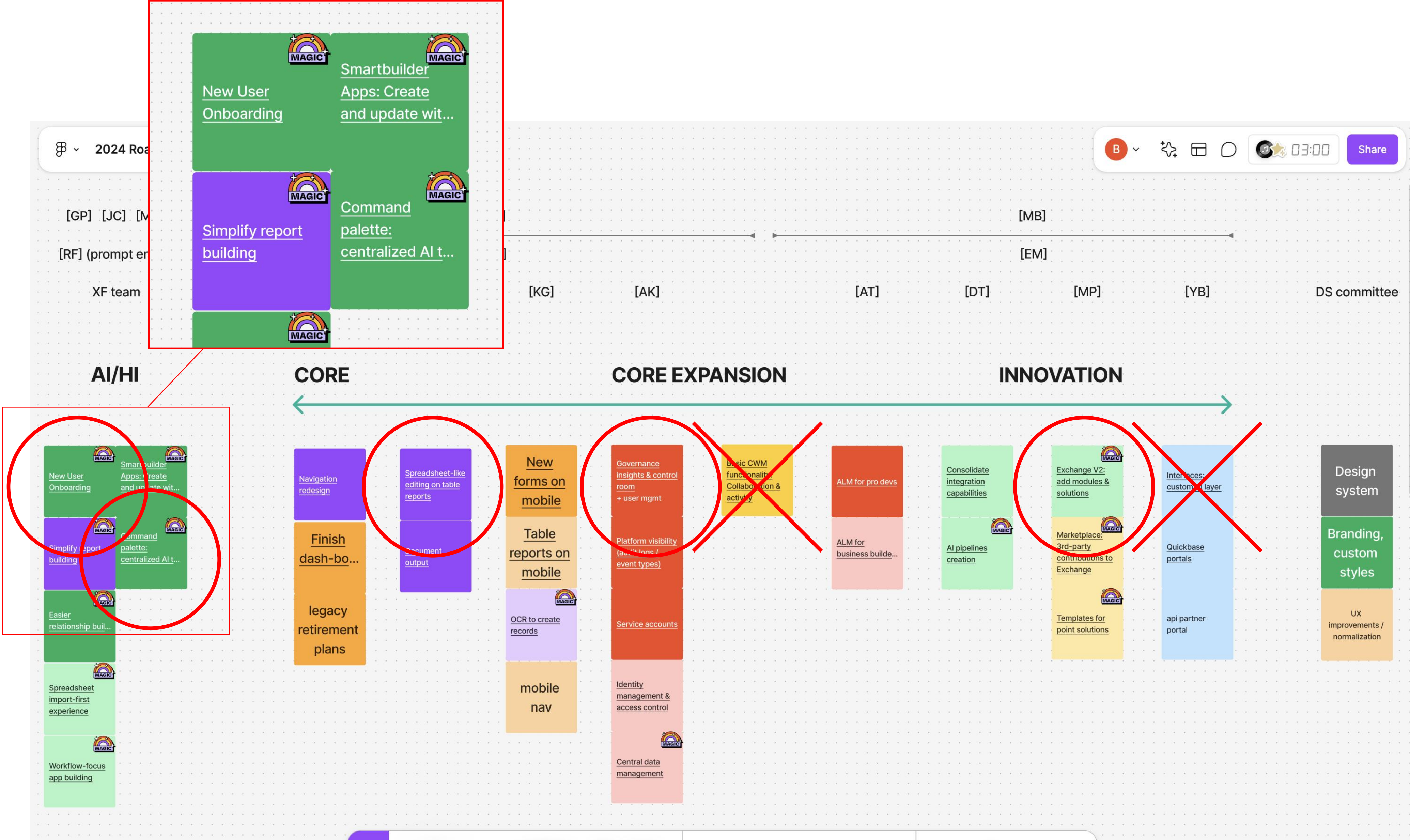
Getting an App from Exchange

Tables - The Building Blocks of an App

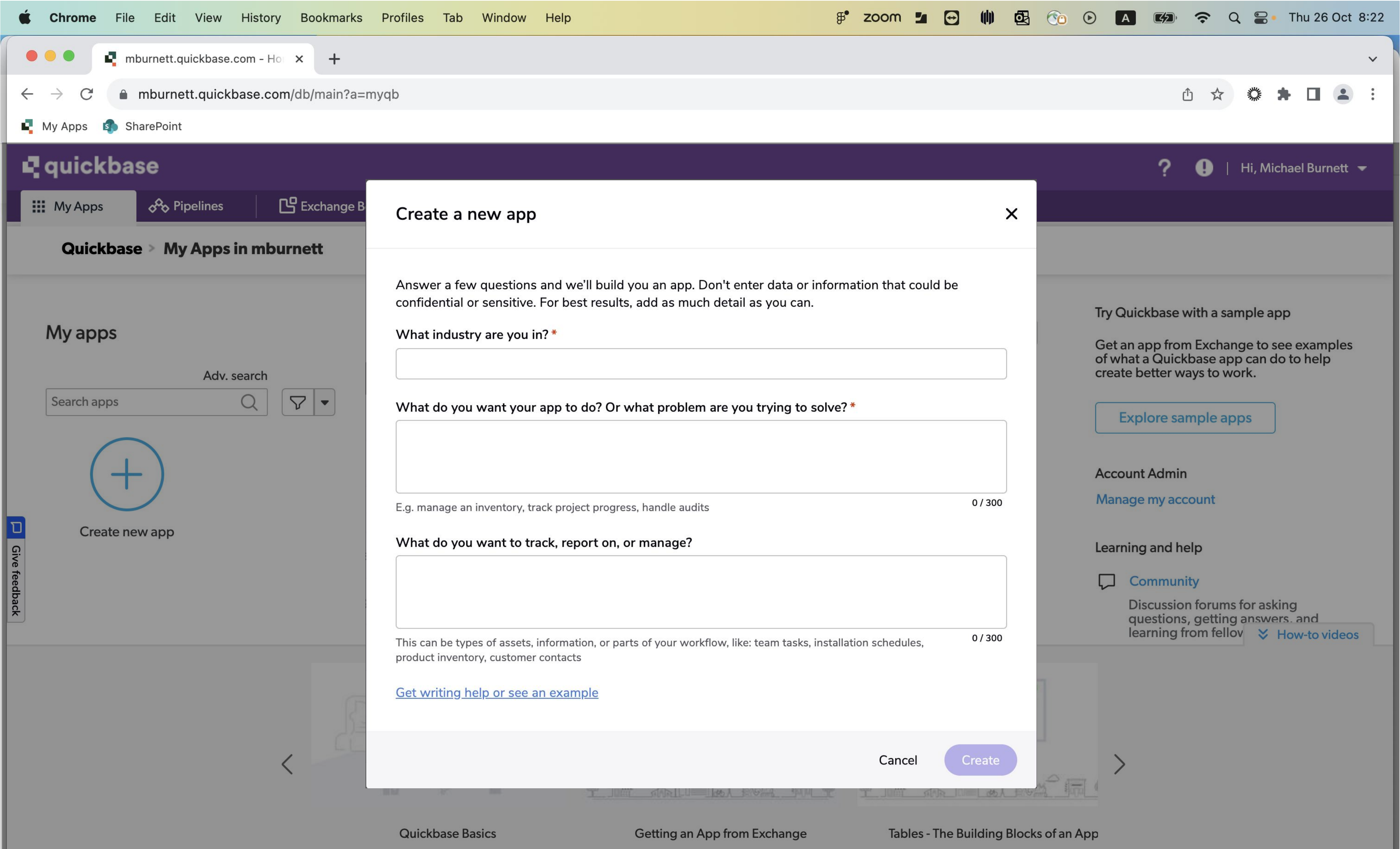
Design proposal for 2024 roadmap



Design proposal for 2024 roadmap



Project concurrent with Smartbuilder test



Project concurrent with Smartbuilder test

The image shows a web browser window with the Quickbase interface. A modal titled "Create a new app" is open, prompting the user to answer three questions to build an app. The background shows the "My apps" section with a search bar and a "Create new app" button.

Create a new app

Answer a few questions and we'll build you an app. Don't enter data or information that could be confidential or sensitive. For best results, add as much detail as you can.

What industry are you in? *

What do you want your app to do? Or what problem are you trying to solve? *

What do you want to track, report on, or manage?

[Get writing help or see an example](#)

Cancel Create

Background Interface:

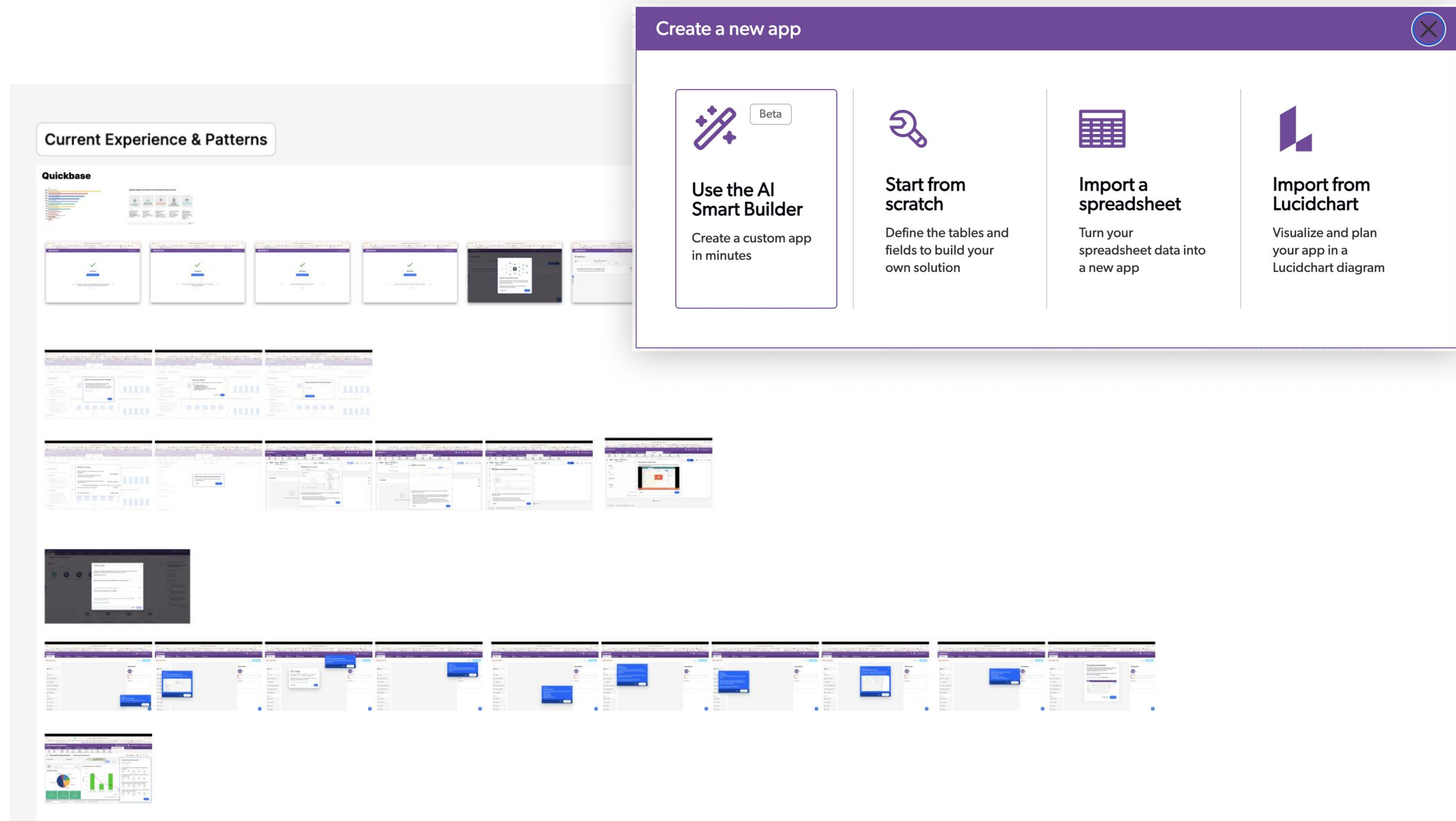
- Header: quickbase, Hi, Michael Burnett
- Navigation: My Apps, Pipelines, Exchange B
- Section: Quickbase > My Apps in mburnett
- My apps section: Adv. search, Search apps, Create new app (+)
- Footer: Quickbase Basics, Getting an App from Exchange, Tables - The Building Blocks of an App

incidentally, UX proposed a change from only 1 field to 3 fields, based on the type of questions that the Customer Advisory Group would ask a new customer. This was not to improve AI functionality, but to improve UX.

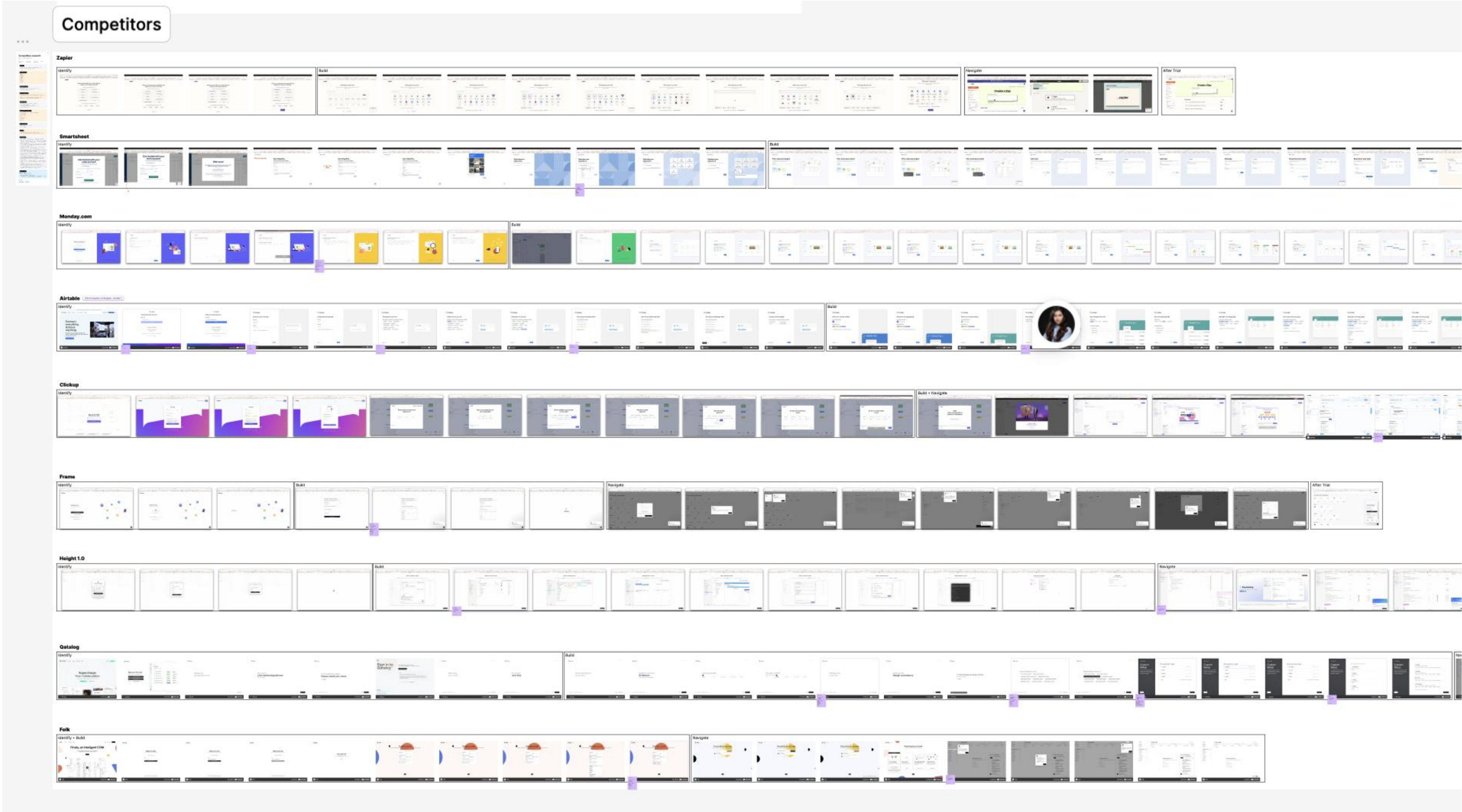
Result:

+19% conversion

Current experience analysis



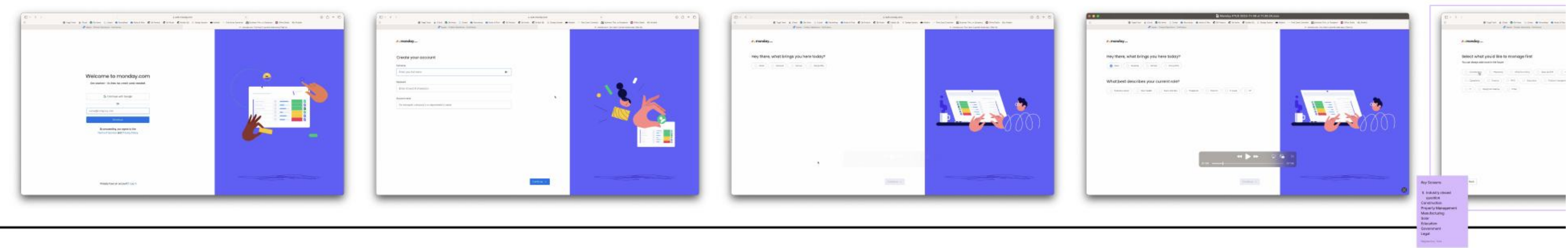
Competitive analysis



Competitive analysis - not reinventing the wheel

Monday.com

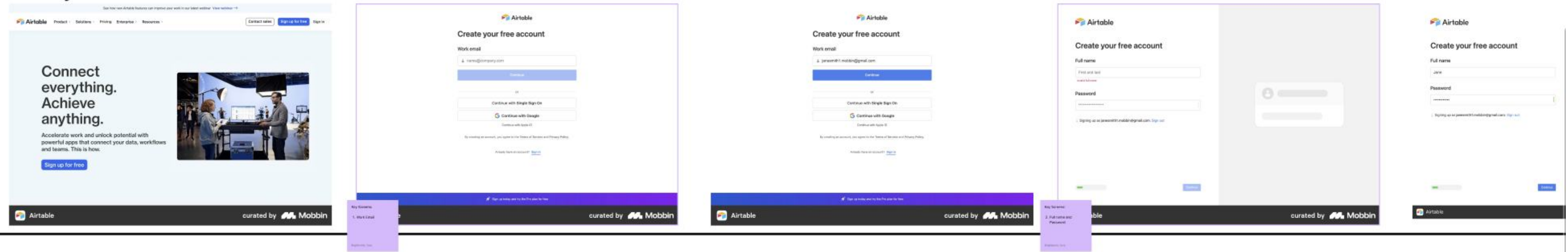
Identify



Airtable

2023 Competitor UX Analysis - Airtable

Identify



Clickup

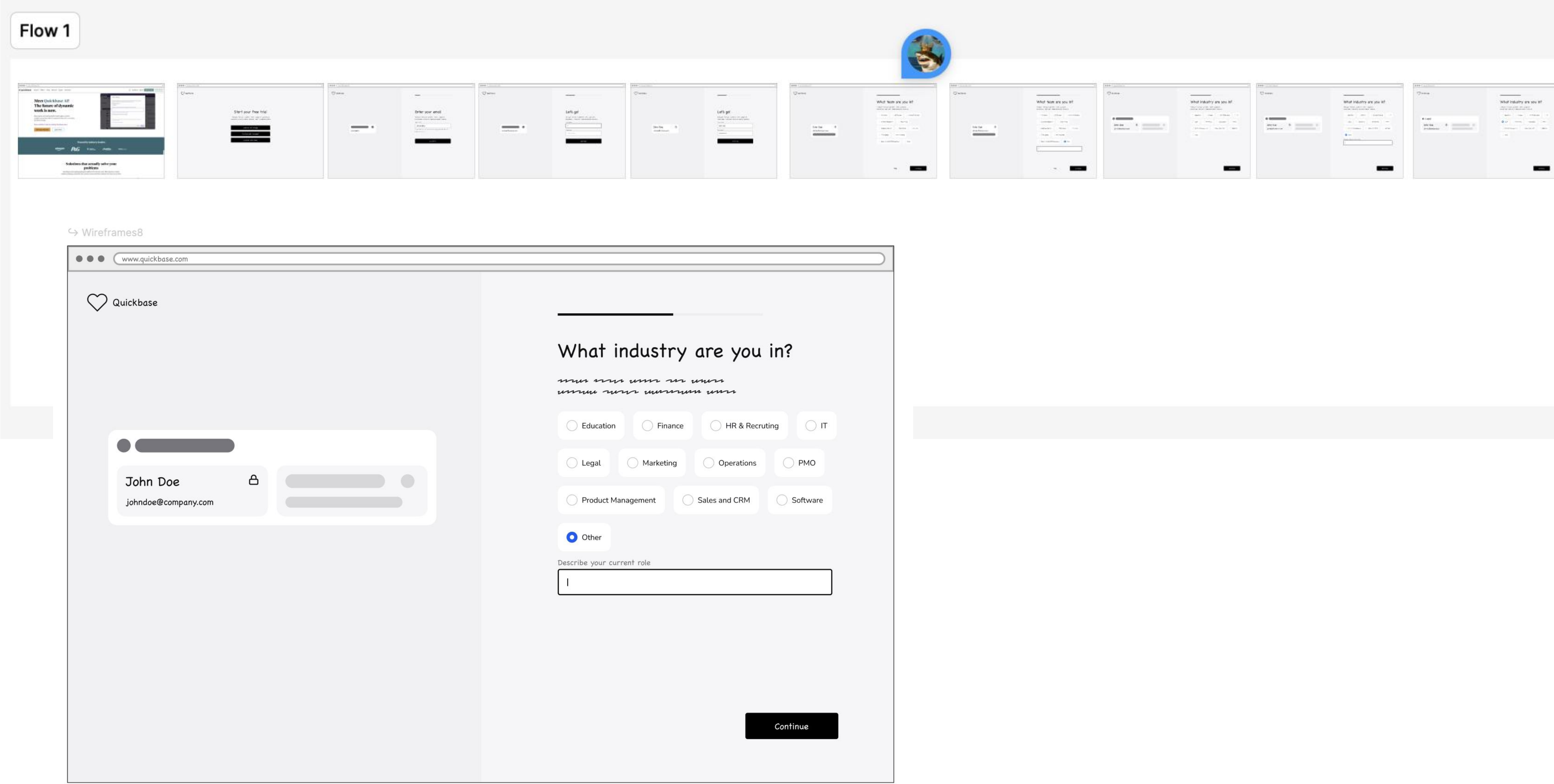
Identify



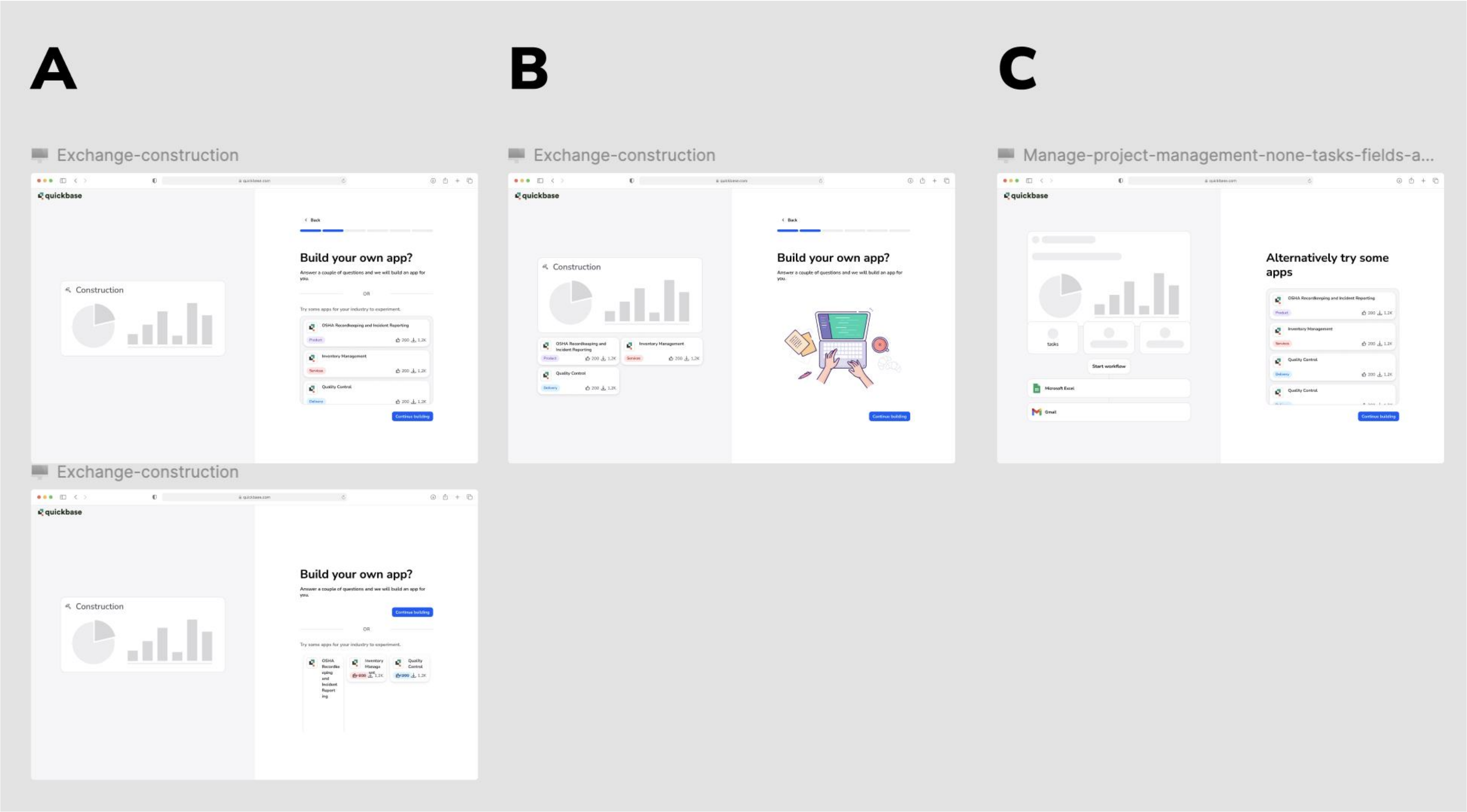
Takeaways, Goals, & Constraints

- *stick with familiar, established best practices*
 - *make the flow shorter than competitors*
 - *keep it similar enough to other QB flows so it isn't jarring*
 - *BUT, elevate our design and use latest components*
 - *add visuals/illustrations for a more friendly experience*
-
- *keep it technically identical to AI onboarding for valid A/B testing*

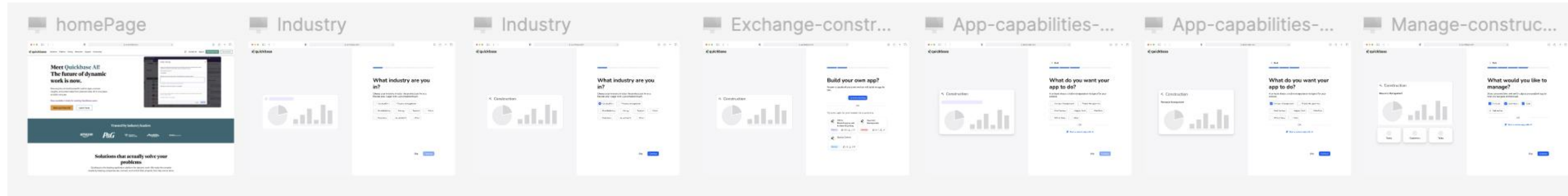
Lo-fi flows to identify challenges (layout, content, steps)



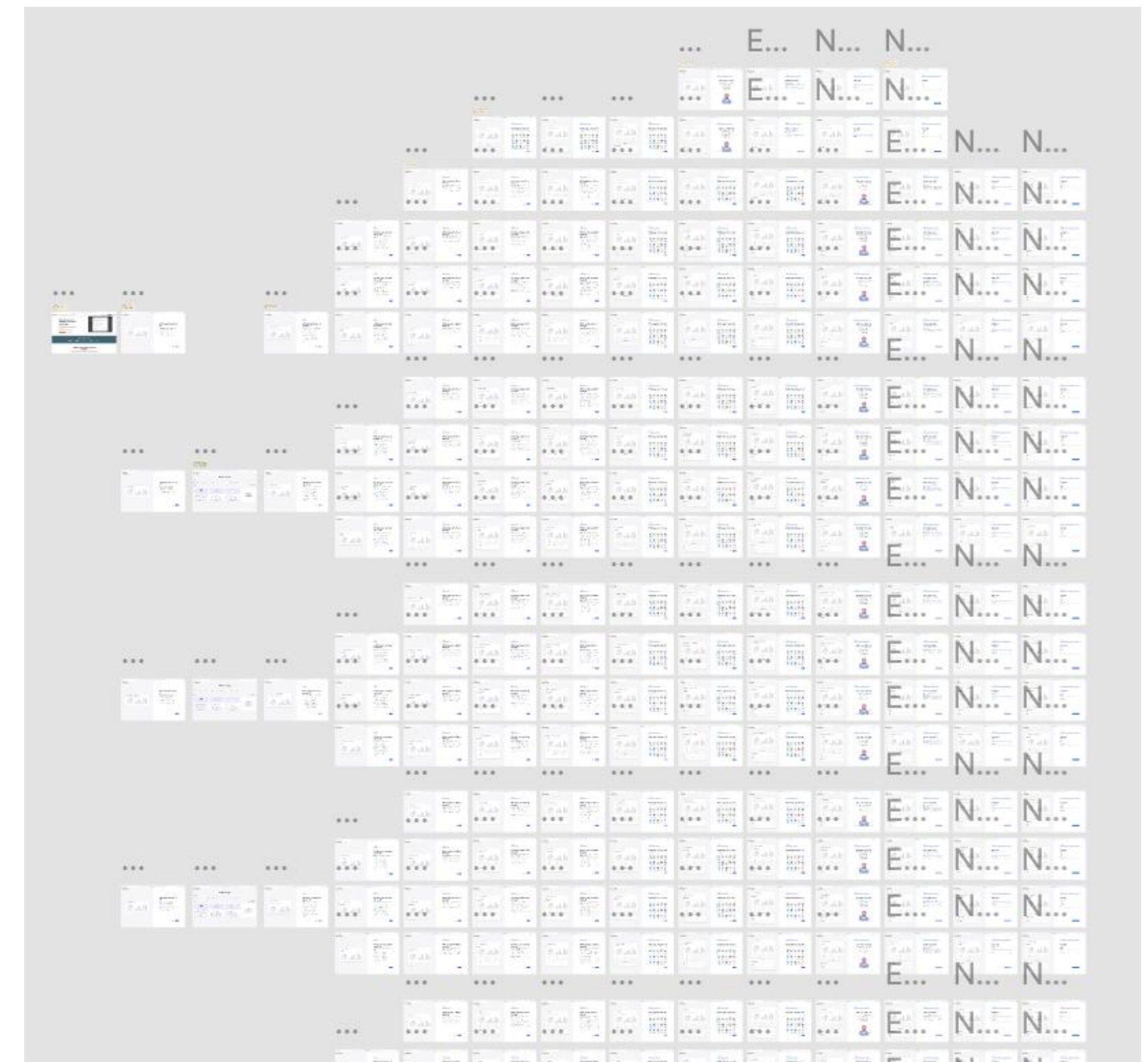
Hi-fi explorations to determine direction



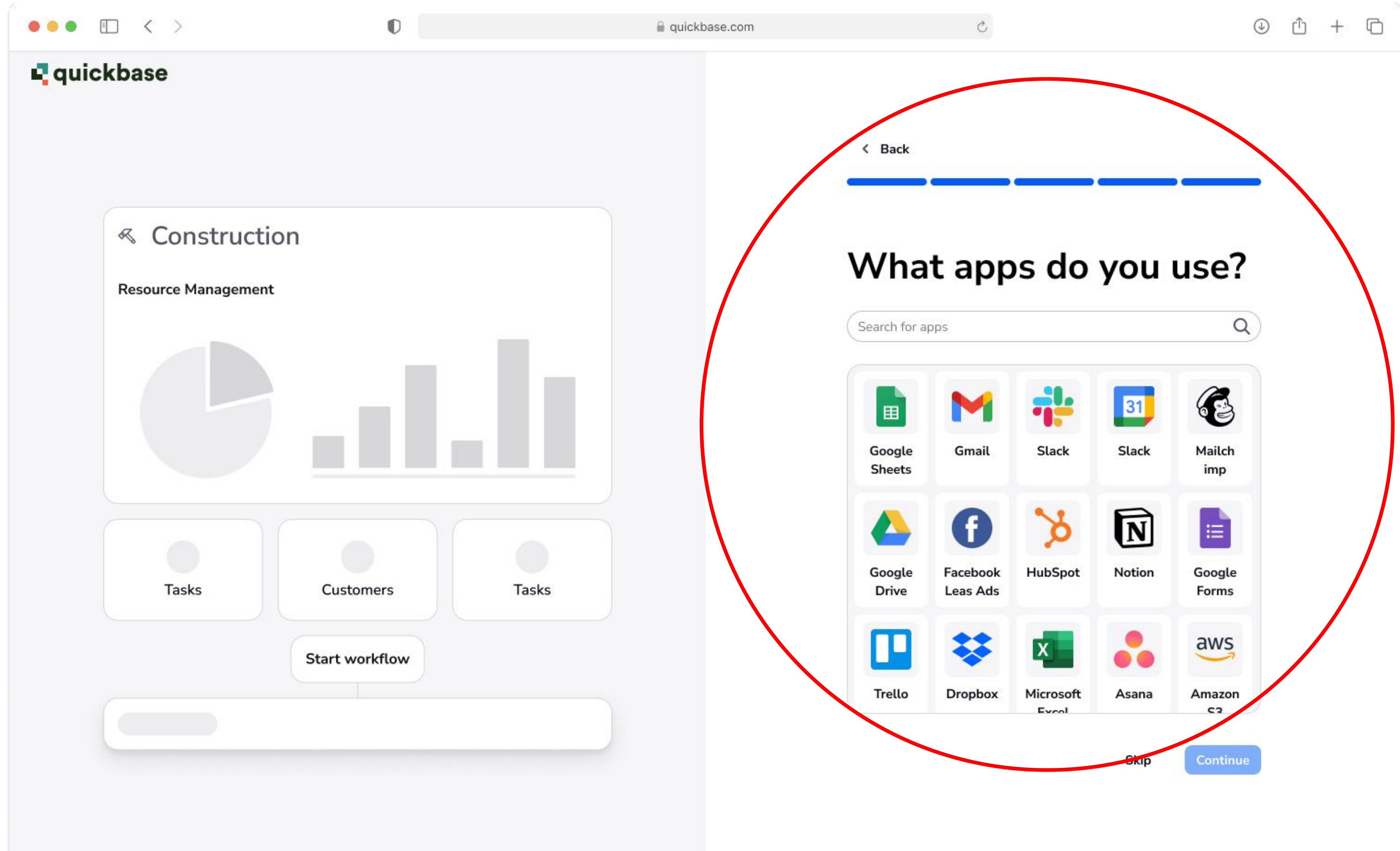
User testing approaches



- *happy path* for *qual*, *sentiment*
- “*all*” *paths* for *usability challenges*



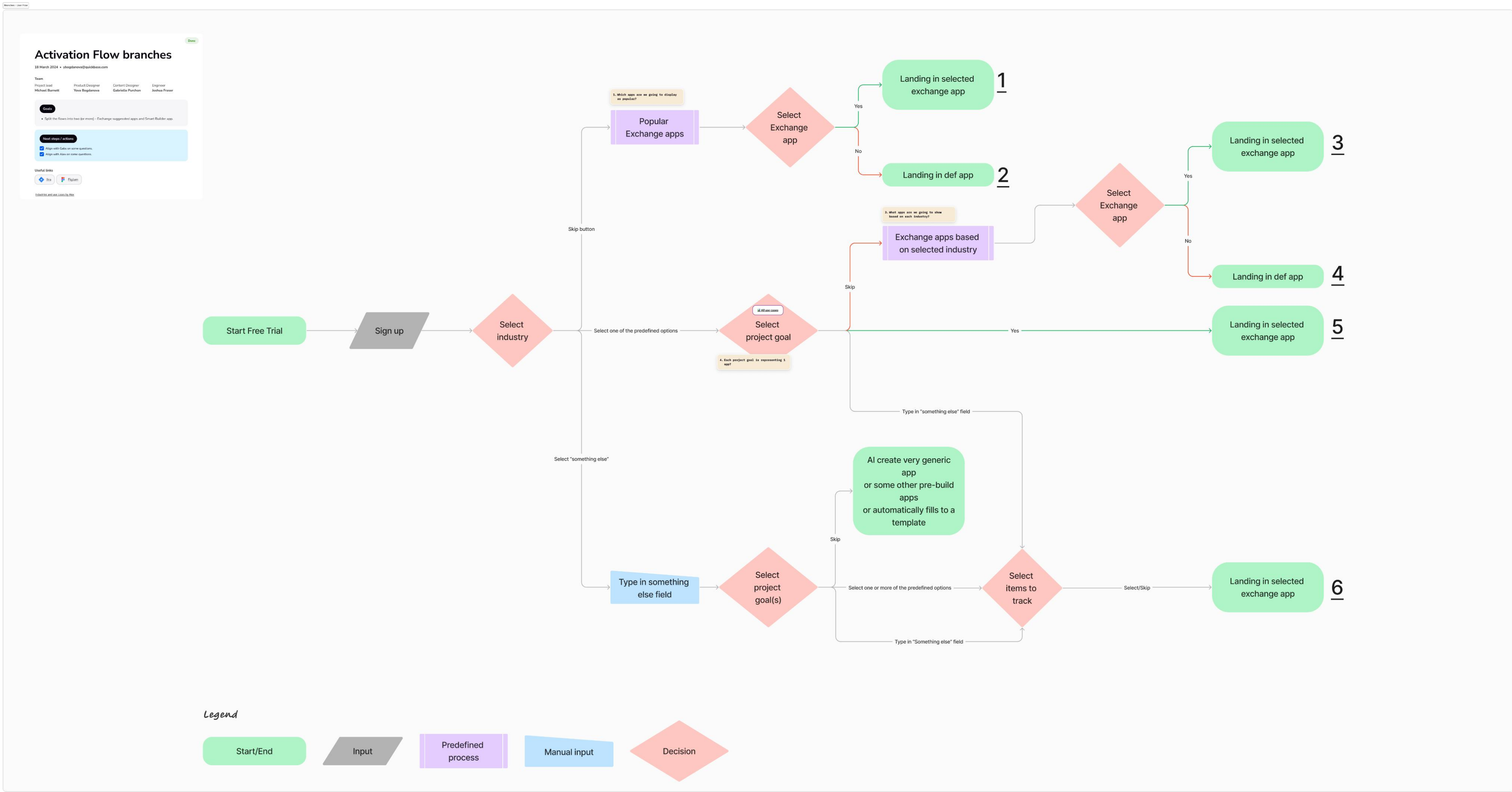
Learnings from user testing



Cross-functional partnerships

- *Sales - new trial activations prompt sales team to reach out, they desire more data about the user*
- *Exchange - this project was now revived, we wanted to be sure that we had high-quality templates for each of the options in the flow*
- *Marketing (web) developers - there was some swirl about developer resources as well as product analytics*
- *Marketing - needed alignment between marketing site and product experience*

Branch logic



User flow (example branch)

START

HERE

SolutionsPlatformPricingResourcesSupportCommunity

Contact UsSign InStart Free TrialGet a Demo

Meet Quickbase AI!

The future of dynamic work is now.

Now anyone can build powerful custom apps, uncover insights, and protect data from potential risks. All in one place, all within minutes.

Now available in beta for existing Quickbase users.

Start your free trial

Learn more

Trusted by industry leaders

amazon

P&G

FRESENIUS MEDICAL CARE

Mondelēz International

CVS pharmacy

Solutions that actually solve your problems

quickbase

Create a new app

Answer a few questions and we'll build you an app. Don't enter data or information that could be confidential or sensitive. For best results, add as much detail as you can.

What industry are you in? *

Construction

What do you want your app to do? Or what problem are you trying to solve? *

E.g. manage an inventory, track project progress, handle audits

What do you want to track, report on, or manage?

This can be types of assets, information, or parts of your workflow, like: team tasks, installation schedules, product inventory, customer contacts

Get writing help or see an example

CancelCreate



Discover all the benefits of Quickbase before you commit

Register for a free trial and discover why more than 6,000 organisations trust Quickbase:



With your trial, connect your custom projects, teams, and

Create an account to start your 30-day free trial

Business Email Address

Create Password

☐ Please keep me up-to-date on the latest Quickbase news, events, articles, and information about Quickbase services via email or telephone. I can [unsubscribe](#) at any time.

Start My Trial

By registering, I agree to the [Terms of Service](#) and understand Quickbase will use my personal information to provide me access to the free trial. See our [Privacy Policy](#) for details about Quickbase's collection and use of your personal information, and your rights.

Have questions before you start your trial? I can help.





< Back

Hi, John!

Answer a few questions and we'll help

Smart Builder will use popular Quickbase apps in your industry to build your app and generate sample data

Select an industry for your first project



- ☒ Construction
- ☐ Energy
- ☐ Government
- ☐ Healthcare
- ☐ Manufacturing
- ☐ Property management
- ☐ Retail
- ☐ Telecom
- ☐ Something else

Skip

Continue



John Doe
johndoe@company.com



Construction

< Back

What best describes your project ?
or project goals?

☐ Project Management and Tracking

☐ Inventory Management

☐ Work Order Management

☐ Client Relationship Management

☐ Human Resources Management

☐ Quality Control Monitoring

☐ Something else

Skip

Continue



John Doe

johndoe@company.com



Construction



<

Back

Try a popular template app in your industry

Installation

Project Equipment Usage

The Project Equipment Usage starter app helps project managers and team members track the usage of...

OR

Apps from other industries

Project Management

Simple Project Manager

This application template demonstrates a wide range of features that our product offers.

Skip

Let's go

John Doe

johndoe@company.com

<

Back

Try a popular template app in your industry

Installation

Project Equipment Usage

The Project Equipment Usage starter app helps project managers and team members track the usage of...

OR

Apps from other industries

Project Management

Simple Project Manager

This application template demonstrates a wide range of features that our product offers.

Skip

Let's go

John Doe

johndoe@company.com

Construction Manager

Setting up your workspace



We are preparing your app...



John Doe

johndoe@company.com

🔑 Construction Manager

Billing and invoicing

🏠 Home

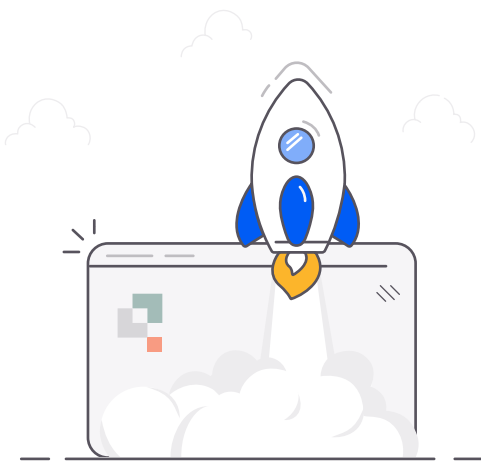
👤 Users

● products

● customers

● tasks

Welcome to your first Quickbase app!



Here is some text that will tell you what to do next...

- Check out
your
Dashboard
- View the
App's
structure
- Customize
the UI of your
forms

Results

A/B test: 732 users were in the test group, 1034 were in the control.

97%+ of users chose the pre-configured options over “other.”

- *Discovery calls:*
 - *Results: test showed a **53% improvement** of discovery calls over the control with 97% certainty*
- *Sales Qualified Opportunities:*
 - *Results: **87% improvement** in SQOs over the control with 98% certainty*
- *Time to first app creation:*
 - *Results: **89% reduction** in time spent creating 1st app*