

SaaS Product Adoption Checklist

Part 1: Onboarding and First-Time User Experience

- ☐ Map your user's "Job to Be Done" and design the shortest path to that outcome.
- ☐ Implement an interactive walkthrough that guides users through a core task, having them "learn by doing."
- ☐ Remove any unnecessary sign-up fields or steps that don't contribute to the first-time experience.
- ☐ Provide an immediate "quick win" so users experience value within their first session.
- ☐ Introduce complex features with progressive disclosure, revealing them only when needed.

Part 2: Data-Driven Optimization

- ☐ Set up analytics to track your product activation and feature adoption rates.
- ☐ Monitor daily active users (DAU) and monthly active users (MAU) to measure product stickiness.
- ☐ Analyze conversion funnels to identify where users drop off and get stuck.
- ☐ Use session recordings to see how users interact with your product and spot points of friction.
- ☐ Segment user data by role or goal to personalize the experience for different user groups.

Part 3: User Education and Engagement

- ☐ Embed an in-app knowledge base with searchable articles and video tutorials.
- ☐ Use contextual tooltips to provide help on specific features at the moment a user needs it.
- ☐ Launch a user community (e.g., Slack, Discord) where users can get peer support.
- ☐ Use behavior-triggered in-app messages to guide users toward key features they haven't used.
- ☐ Set up a feedback system with micro-surveys to collect real-time insights from users.

Part 4: Continuous Improvement and Retention

- ☐ Establish a formal feedback loop to ensure you're listening to and acting on user input.
- ☐ Maintain a public product roadmap to build trust and keep users excited about future updates.
- ☐ Communicate new feature launches and updates with in-app banners and clear release notes.
- ☐ Run A/B tests on your onboarding flows and feature adoption prompts to find what works best.
- ☐ Develop a customer success program to provide ongoing support and ensure users get the most value from your product.