The Product Leader's Guide

to Cross-Platform Onboarding Experiences

branch

Let's get started

For product managers onboarding users across platforms, channels, and devices, time and money are the ultimate measures of success. We want to help you maximize both.

Before we get underway, a quick summary of what's at stake:

- 20% of users abandon apps within 30 seconds of their first installation.[1]

- The average mobile app loses 71% of its users within one day after they download. After a month, 90% are lost; and after three months, 96%.[2]

- 25% of apps that run the gauntlet from awareness to download are used just once during their first six months on a user's device.[3]

- After four weeks, the average retention rate for cross-platform users is 28% higher than the rate for single-platform users.[4]

- The average cost to acquire an app install generally falls within the range of $4 to $8; and to convert a new user ranges from $60 to $100.[5]

There is hope, however: Top brands drive 20-40% of app installs from the mobile web, where acquiring users is less expensive than via paid app acquisition channels. They use this dynamic to their advantage by leveraging linking technologies and proven onboarding techniques to bridge gaps between web and app experiences. In short, they create reasons for users to stick around and as a result improve their ratio of Lifetime Value (LTV) to Customer Acquisition Cost (CAC).

In this white paper, we'll explore field-tested approaches to winning the cross-platform onboarding game and earning the love, referrals, and revenue that result.

Table of contents

Section One

Decisive Moments

User journeys have evolved from single-touchpoint to complex, cross-platform interactions. Best-in-class app and web experiences reduce the friction of these complexities to deliver conversions in minimal time.

We've found that devoting attention to the following decisive moments can dramatically improve the probability that committed, profitable users onboard quickly and stay for the long haul.

The in-app share of US mobile time has continued to increase while time on the mobile web has remained stagnant. According to eMarketer, 3 hours and 14 minutes per day are spent in-app versus just 22 minutes on the mobile web. [6]

- **Registration**: Offer users the option to save time by signing in via popular platforms such as Google or Facebook. Though this process is now standardized, it's an entry point to personalized onboarding. Our advice: Link directly from paid and organic media, keep your copy simple, design clean, and supporting web and app integrations seamless. Instacart is an example of an app that accomplishes these goals while helping users get started fast.
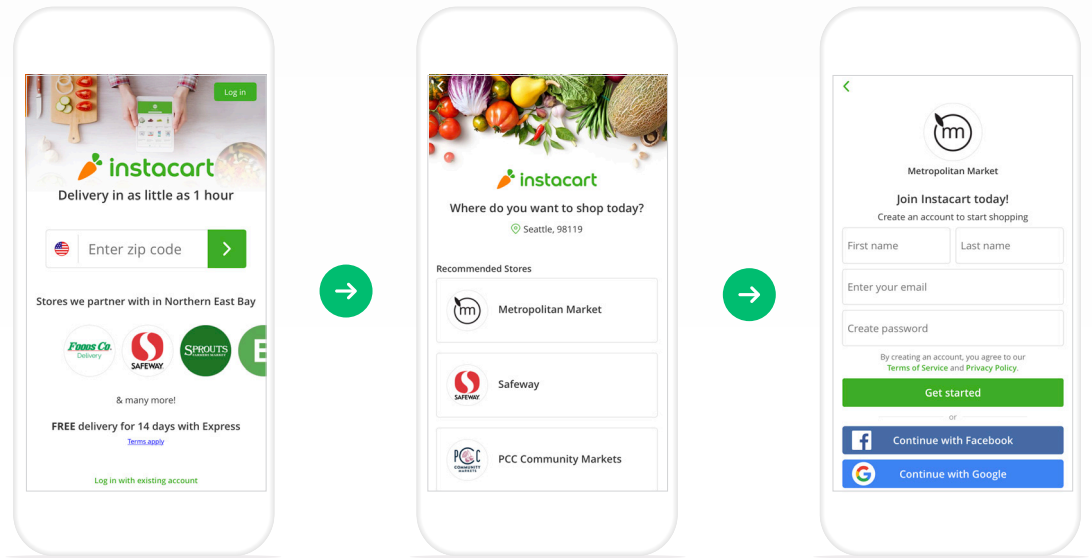
From install to local and personalized onboarding in three screens

• **Auto login**: Use link parameters to log web users into your app without interruption. Like platform registration, it's a basic piece of functionality that's expected among leading apps. It's also a simple, time-saving delight that says to users, "Yes, this product was built for me." Here's an example of a common sequence of links spanning mobile web and app experiences.
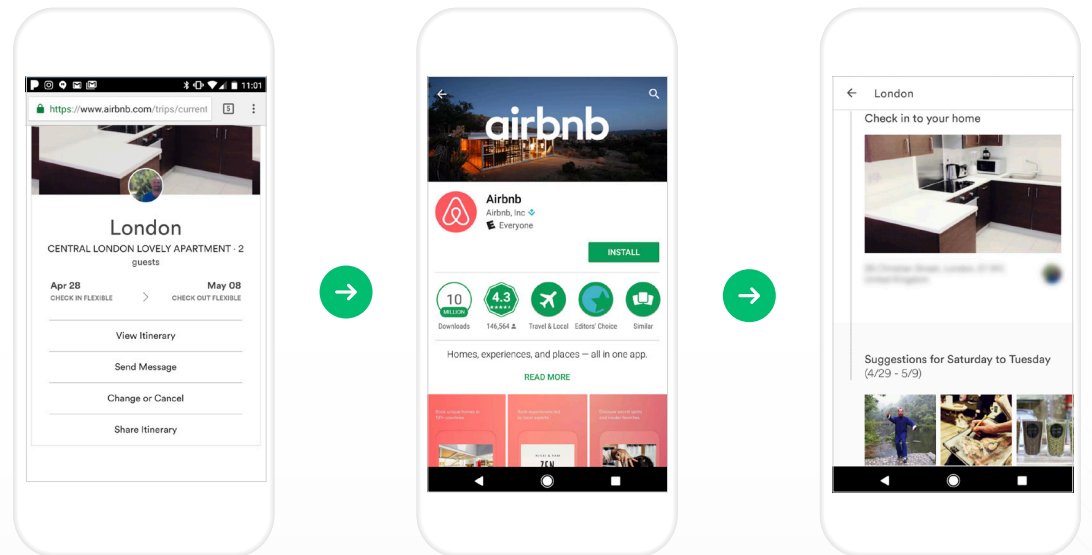

Mobile web link to app install to link destination in-app

Mobile app users convert 3x more than mobile web users and spend 20x more time in apps.[7]

- **The showcase showdown.** Once users have navigated through registration, a door to new experiences is unlocked. As a product leader, you're the welcoming committee and will be granted a few brief seconds to showcase how users can quickly benefit from your product. Multiple tips on seizing this moment are presented in the strategy and tactics sections later in this white paper. Quick preview: There's no need to walk users through every corner of your app when a direct link straight to the features they really need is available. As an example, Foursquare makes it easy for users to quickly see where and how they can interact with the app.
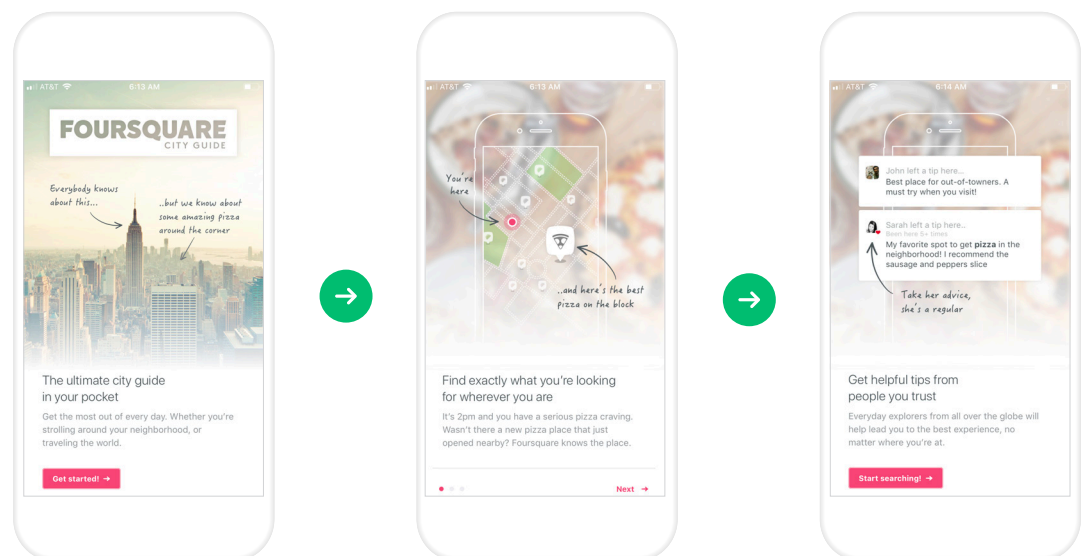
A sample three-screen orientation sequence

Companies that cater to cross-platform users reap major benefits. Branch data shows that cross-platform users spend 2.2x more and have a 10% higher retention rate than their single platform counterparts.[8]

- **First share.** The act of sharing has multiple dimensions, two of which we'll note here. The first is between web and app; and the second app-to-app. One popular solution among Branch customers is Text Me The App (TMTA), which makes it easy for users to

text themselves (or someone else) a link from a web experience to an app destination. It's like time travel when users can skip a visit to an app store or the need to follow multiple redirects. Whether web-to-app or app-to-app, the ability to quickly move from promise to purpose is a validating moment. Supporting data: At Branch, we've seen a 42% install rate with TMTA clicks and higher conversion signups than with any other linking feature. Here's an example of a TMTA sequence:
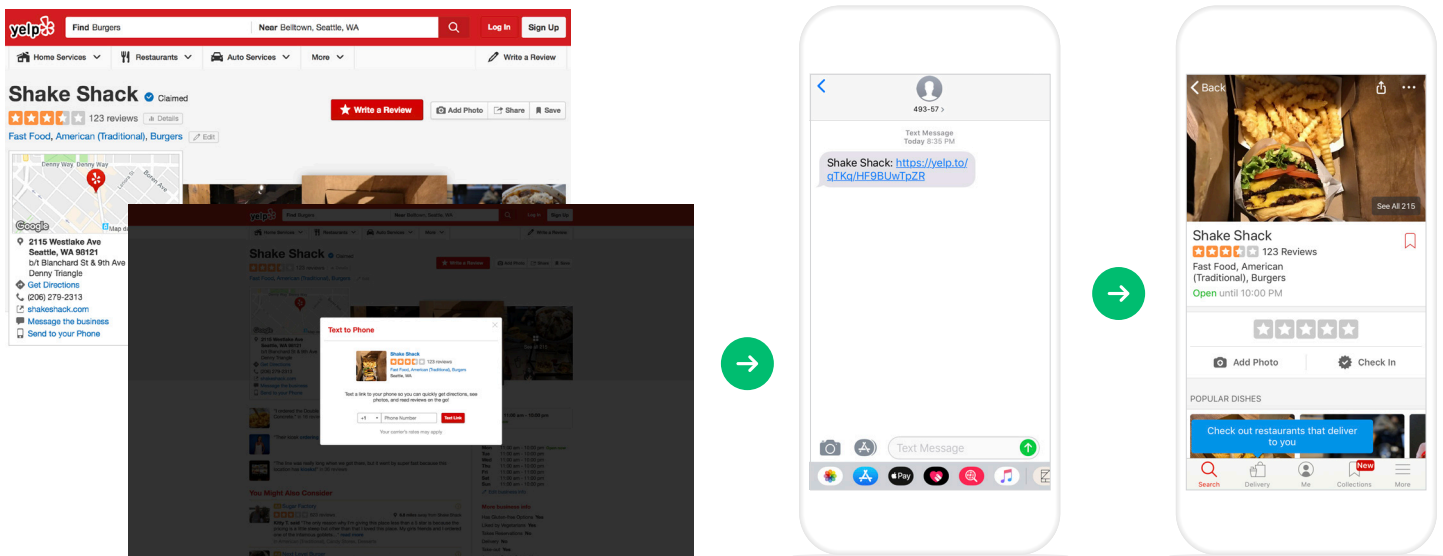
Desktop-to-text-to-app

- **First task.** A signal of onboarding effectiveness is whether or not users are able to quickly complete their first task. If the engagement you desire (a transaction, an upload, a message, an achievement unlocked or game played, another platform integration) ensued, then your efforts are paying off. Still, today's onboarding strategy — great as it might be — will not remain valid forever. Every new feature, benefit, and UX change will merit another opportunity to personalize and provide a fresh look at how you're engaging across desktop web, mobile web, and app. Net: The more accurately you're able to distinguish user flows and deep link (and deferred deep link) to targeted content, the stickier your product will become. In the next example, users are able to connect directly from a web banner to either an app store or straight to the in-app content they desire. In both cases, the route from impression to onboarding (as necessary) and first task occurs with minimal interruptions.
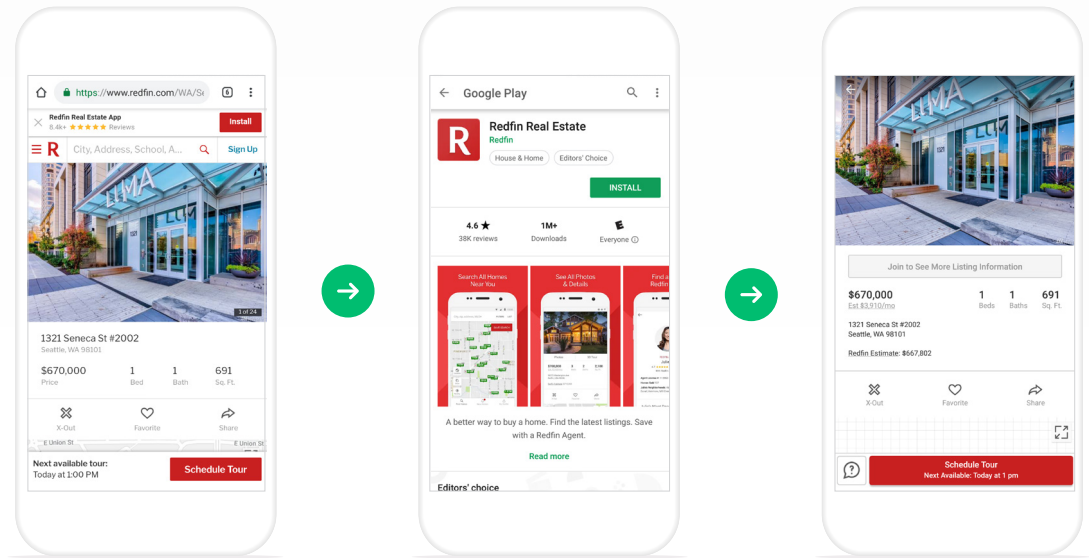
*Tap a download banner on the mobile web, install the app
(if necessary), and proceed directly to specific content*

In a recent study, 57.4% of leading marketers referenced onboarding as a top tactic for triggering mobile conversions, trailing only UX/UI improvements and push notifications.[9]

- **Additional post-install firsts**. The medium is the message: every day, on every platform, in every interaction. To deliver the conversions you need, these interactions must be individually packaged for each channel, yet remain consistent with the impressions and goals you're pursuing. For example: The first email following an app install? It's hyper-critical that it's easy to view, references a recent interaction, and directs users to their next logical engagement. (Hint: Branch's Universal Email can help with this.) The first push notification on a user's mobile device? Clear direction and purpose win the taps. The first web login after installing an app? Make absolutely certain user data and assets are in-sync. Tolerance for misaligned experiences is at an all-time low (zero), leaving you one choice: land every first, on every screen. For example, the first email after installing the Tradesy app makes a positive impression by linking directly to app experiences, as well as additional how-to on the company's mobile website.
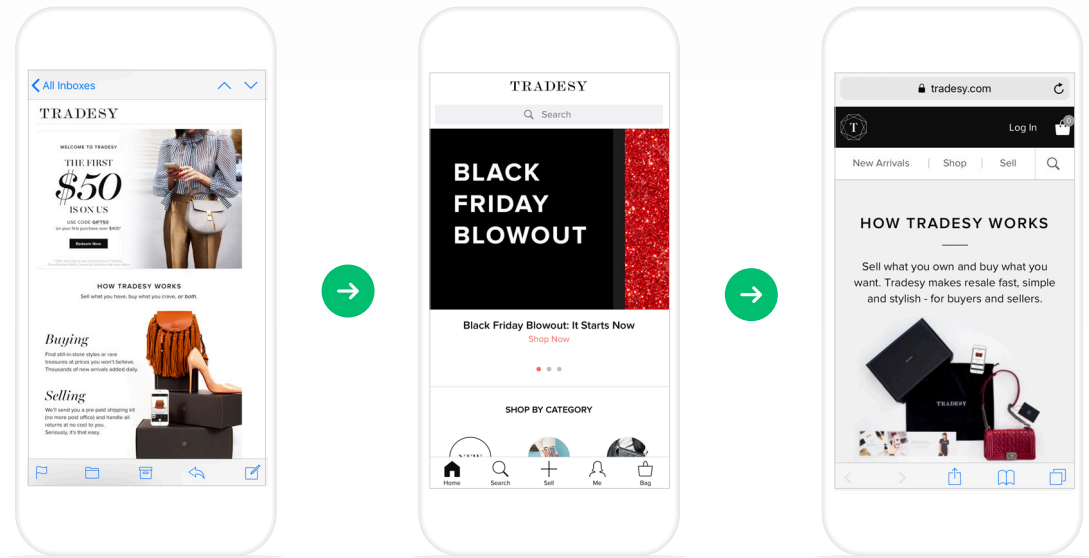
Email links to in-app and mobile web experiences

- **Re-boarding**: Every product refresh is an opportunity to surface new features and benefits to existing users. The same applies for users who may be returning to your app or site after a long break. Got a special announcement? Insert screens, examples, and data in user emails, each with a link to web and app experiences where users can automatically login and interact for themselves. Releasing a new feature? Make it pop with a benefits-focused, in-app tutorial. In short, onboarding never ends and neither do decisive moments. Seize them like your product depends on it...which it does. More on these and related concepts in the tactics section below.

Increasing installs and conversions, direct results of better mobile app experiences, are among the top mobile marketing team priorities.[10]

Product managers tend to be stymied less by the complexity of each individual moment than by the large and growing number of critical moments within and across web and app instances. Prioritizing those with the largest influence on user engagement, growth, and advocacy is therefore job #1. Now let's talk strategy.

Section Two

Think Fast

Effective onboarding begins with clear understanding of your product's goals and avoids overloading users with too much, too soon. This means you'll need to prioritize web and app user flows, plus the calls to action that will make the biggest difference for your business. For instance: Are you driving commerce or content, information or entertainment, free or paid services, shared or private data, integrated or standalone experiences? These considerations, among others, will determine the onboarding options you'll want to expose and when.

We all know that channels and platforms vary in complexity. What's easy in one scenario can be problematic in another (spreadsheets on a phone, anyone?).
This places special emphasis on product managers striking a balance between controlling what they can and giving users the power they demand.
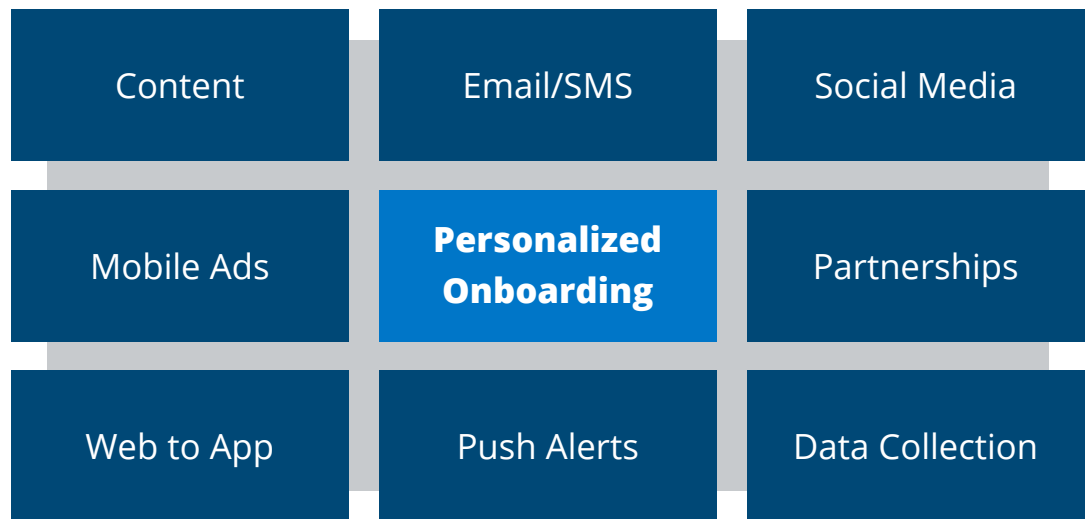
According to BJ Fogg of Stanford University, behavior is the product of motivation, ability, and the presence of a trigger. Each of the strategies and tactics covered in the following pages relates to these factors.[11]

- **Establish *your* benchmarks**. We tend to get what we measure, a tenet as applicable to onboarding as any other facet of software development. In seeking speed of user activation and engagement. Be sure you have the tools necessary to track both and reconnect with users to ensure their experience is as intended. This will help you refine your onboarding processes and improve the probability of high user satisfaction. Consult industry guidelines, for sure. Also leave room to measure — and think — for yourself.

As illustrated below, multiple product-related investments map directly to personalized onboarding. One of your key foundational goals is to account for the improvement of each.

Content	Email/SMS	Social Media
Mobile Ads	**Personalized Onboarding**	Partnerships
Web to App	Push Alerts	Data Collection

- **Friction is the enemy**. When presented with an option of incorporating more or less upfront help and how-to into your product (especially your app), less is often more. The best apps remove boundaries separating the reasons users downloaded an app and the steps needed to get started. This doesn't mean they push users into the deep end. It means the product managers for those apps are so attuned to their users that they've built an express lane to the primary benefits users are seeking. They show rather than tell and align every step with the metrics used to judge whether or not it was effective. In short: quicker access, quicker conversions. Here's an example of how Gaia makes it easy for users to preview what it will be like to get their app up and running.
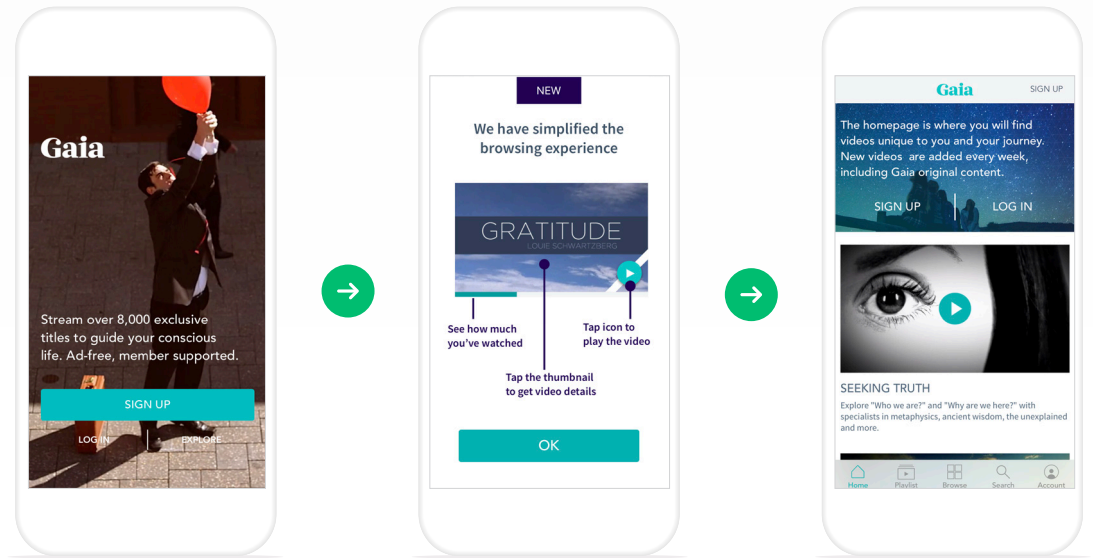
*Initial post-install experiences: from a landing page to a short intro sequence*

There's a 70% higher in-app purchase rate for users entering an app directly from a personalized smart banner, compared to general app users.[12]

• **It's good to have options**. Two users seldom travel the same path from product awareness to app install and conversion. As a product manager, you need to accommodate myriad permutations by leveraging each of your platforms for its best use. Meaning the onboarding tradeoff is less web or app, more web *and* app. Also meaning you'll need to prep what you share as a function of (what else?) speed. We recommend leaning on in-app sequences for basic context, starting with the fundamental how-to's of app functionality. For advanced possibilities and to input detailed user profiles, web platforms can be a better choice. A key role of the product manager is making these options possible and using deep links to maximize every touchpoint.

Industry data suggests that app audiences are 20x more engaged than mobile web audiences and convert 3x more in app than on the mobile web. Deep links are a catalyst in making this happen.[13]
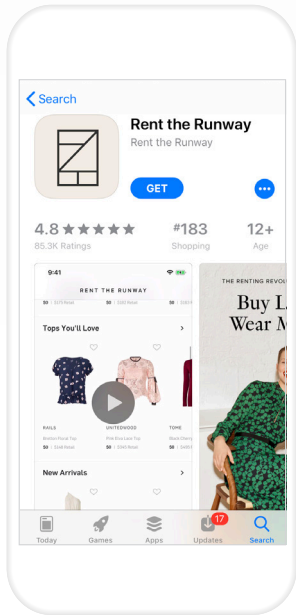
- **Make your own trailer.** More apps are showcasing key features in short reels presented in their respective app stores, a form of pre-boarding that provides a welcoming brand moment and helps users evaluate whether or not an app might be for them. 'Illustrated at left is a recent example from Rent the Runway, in which users are offered an opportunity to press play and learn more.

- **Just-in-time can be just right**. Another alternative to long tutorials is giving users enough information to get started, then providing progressive onboarding when new scenarios are encountered. For example, if a user wishes to upload rather than download but has never uploaded before, there's an opportunity to provide just-in-time onboarding specifically dedicated to uploading. Making this possible requires more preparation than positioning a full slate of onboarding upfront. However, when considering future opportunities for product and brand re-engagement as users progress deeper into a product's functionality, the additional prep is often worthwhile. We tend to think good-to-go then nice-to-know (rather than vice-versa).
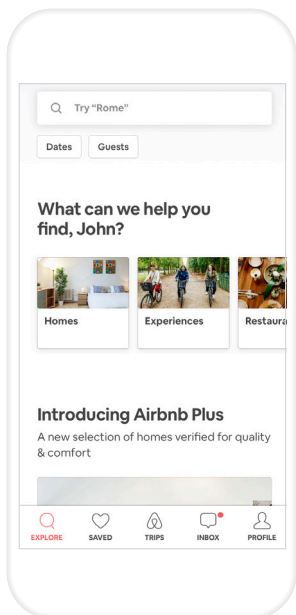
- **Lead with benefits, not features**. It's tempting to position features as the lead story. After all, launching new features is a key product management responsibility. That said, when onboarding cross-platform users, benefits are still king. This doesn't mean erasing all features-driven messaging; it simply means the benefits should be surfaced first. Showcase them consistently in every onboarding interaction and across your web, app, and email campaigns. As you do, you'll help maintain focus on why users are betting on your solution to meet their needs. A widely relatable example is the way Airbnb raises a simple question that speaks directly to their value prop.

- **Email vs. Push**. In the majority of instances, email vs. push tradeoffs are a reflection of relative urgency. During early onboarding, push notifications can alert users to key on/ off decisions that influence satisfaction and utility. Later in the user relationship, email often does a better job. In both instances, keep it simple and don't overdo communication. Also remember to be relentlessly direct and link straight to the decisions required by users and the content critical to keeping them happy.

Lumosity is an example of a company whose conversion rates "increased significantly" and site usage surged 81% after sending emails directly following signup. One of the keys to creating similar success is using deep links to route users directly into apps, where additional onboarding can take place. This approach has also been observed to boost conversion rates by as much as 120%.[14]

- **Login vs. experience the app without login**. This is another big tradeoff for product managers. How much do you give away before requesting user details in return? How can you portray yourself as generous rather than stingy and self-serving? It depends. If a user is known or you have robust desktop and mobile websites where app possibilities are easily discovered (with deep links to relevant in-app experiences), then asking for an app login early may be worth the risk. If not, then providing an opportunity to complete an in-app task before requesting a login may be the better choice. Your portfolio of web and app experiences (and how thoroughly you're able to portray them) matters. Here's an example from Yummly, a recipe app that provides extensive pre-login exposure to what's available to users.
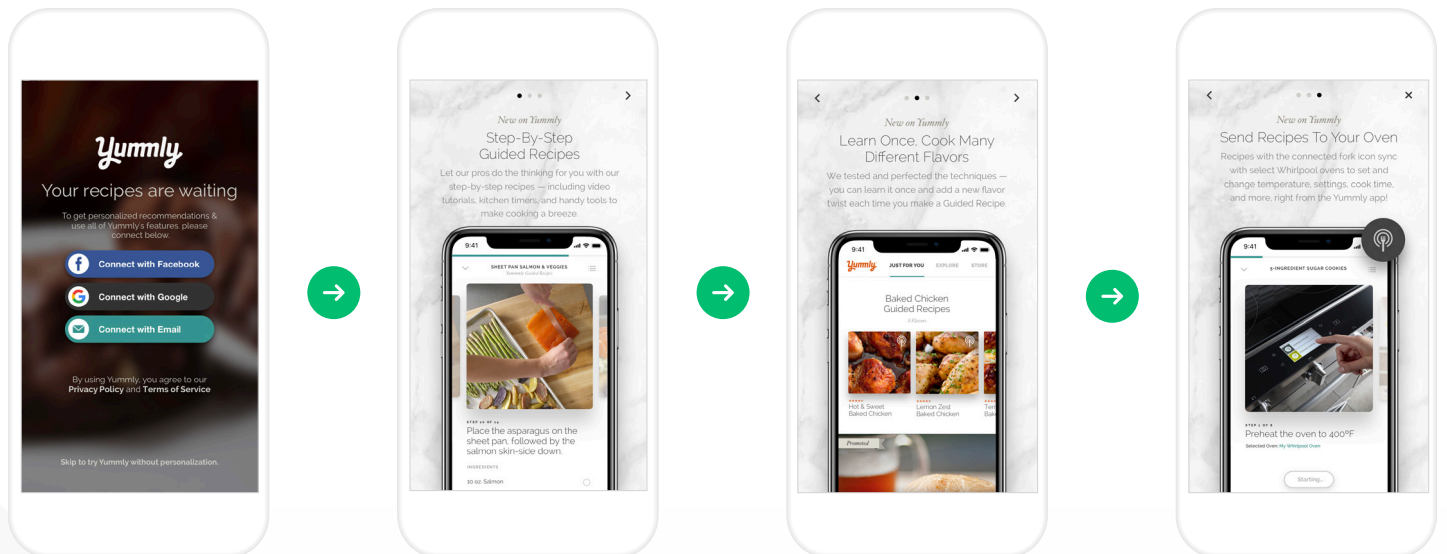
Making it easy for users to learn more about an app, whether or not they're signed in

Branch and MoEngage report that requiring users to register immediately leads to a 50% drop in users before they've even activated their accounts.[15]

- **Achievements (or not)**. Another key consideration is whether or not to make achievements (a.k.a. rewards) part of your onboarding process. The answer tends to depend upon the category of your app. Got a consumer-targeted app that encourages users to organize and share content in a specific sequence? Unlocking achievements can be one way to drive behavior. Conversely, if your app is built for more professional purposes and relies upon knowledge of desktop integrations and user flows, then achievements might not be as relevant or strike the ideal tone. In summary, not everyone needs a trophy (but some still like them).

- **Static or dynamic**. While light and fast is the ideal state, there's still such a thing as too light and too fast. A flashpoint for this decision is static vs. dynamic onboarding sequences. Though static sequences tend to be lighter weight and faster to load, they also sacrifice some of the show-first advantages of dynamic sequences. For example, app users acquainted with your mobile and/or desktop web product might not need dynamic sequences. In either case, remember our first tenet: speed (with quality) wins.

In product vocabulary, onboarding is best when it's an MVP that keeps users in control. All by cashing in on smart strategic bets. Next we'll highlight tactics for helping users start fast and stay inspired.

Section Three
Proven Tactics

Once you've settled on an onboarding strategy that will delight users, your next goal should be to move them through your process as quickly as possible. This is where the brand perception you've established is either made real or falls flat. Tactically speaking, onboarding is a shared experience between users and your app. You'll want to showcase not only the cross-platform features that make your app special, but also that you're placing permissions in the hands of your users and not sacrificing security along the way. Any hitch in the sequence can have immediate and lasting repercussions.

Here's how leading apps optimize their onboarding experiences for both time and quality.

• **State the goal of your onboarding as early in the sequence as possible**.
This can be explicitly stated, as in "Welcome to our app. We're going to help you complete this first task in seconds," or implicitly communicated by positioning top user goals front-and-center. Remember: Your users have already bought into your offer by downloading your app. Onboarding that directly addresses essential functionality shows you're putting their needs first. In the example below, Ticketmaster spares no time in moving users straight into the transactions their app is built to service.
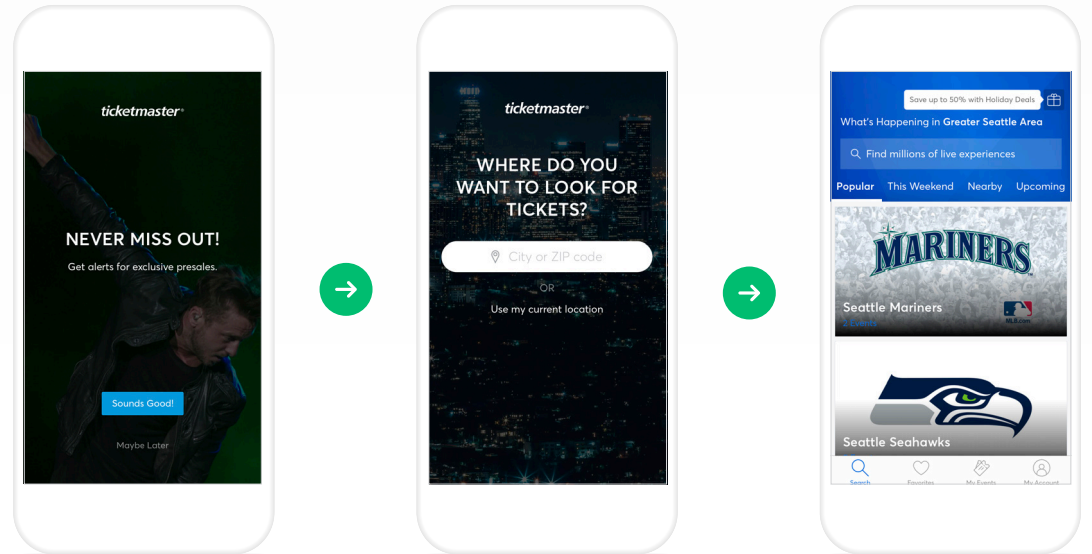
Location-specific details are front-and-center

• **Build onboarding experiences that relate directly to user flows**. This is classic show don't tell, where click and tap actions are more valuable than words. Apps that treat onboarding as a form of orientation and quickly exhibit how also ground their value prop in reality. From simple explanations to clear calls to action and what they mean, effective onboarding places users at the center. We've included an infographic later in this white paper that provides step-by-step guidance on how to use Branch technology to move users directly into these and related sequences. In the meantime, here's an example of how Tradesy prefaces user flows and orients new customers.
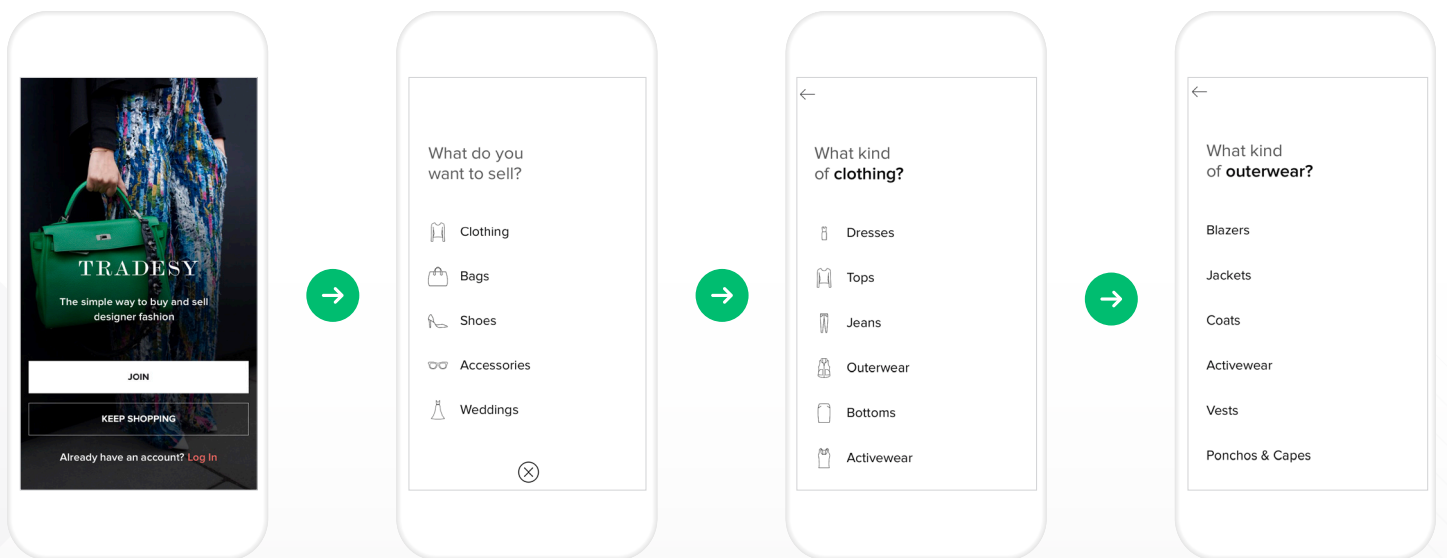
*Keeping onboarding sequences inline with common user experiences*

On a recent list of game-changing mobile technologies, deep linking ranked first by a wide margin.[16]

- **Create seamless handoffs**. From a single starting point, users should be able to leap straight into pertinent content and experiences. Each handoff is critical to users and product managers, both of whom benefit from deep linking (and deferred deep linking) designed to account for user preferences and promote specific actions. Above all, email-to-web-to-app onboarding must be easy.

Let's also take a closer look at the importance of similar thinking for app-to-app traffic. An example worth referencing is Yummly, a personalized food and recipe discovery app, who partnered with Instacart to co-promote Instacart's grocery delivery for items featured in Yummly's recipes. As a result, Yummly experienced a 35% boost in one-week retention, a 28% leap in items added to shopping lists, and approximately 10% of US customers took advantage of the offer. This was all powered by app-to-app deep linking and supported by efficient onboarding.[17] The following sequence showcases how users can seamlessly move from identifying a recipe in Yummly to purchasing ingredients on Instacart.
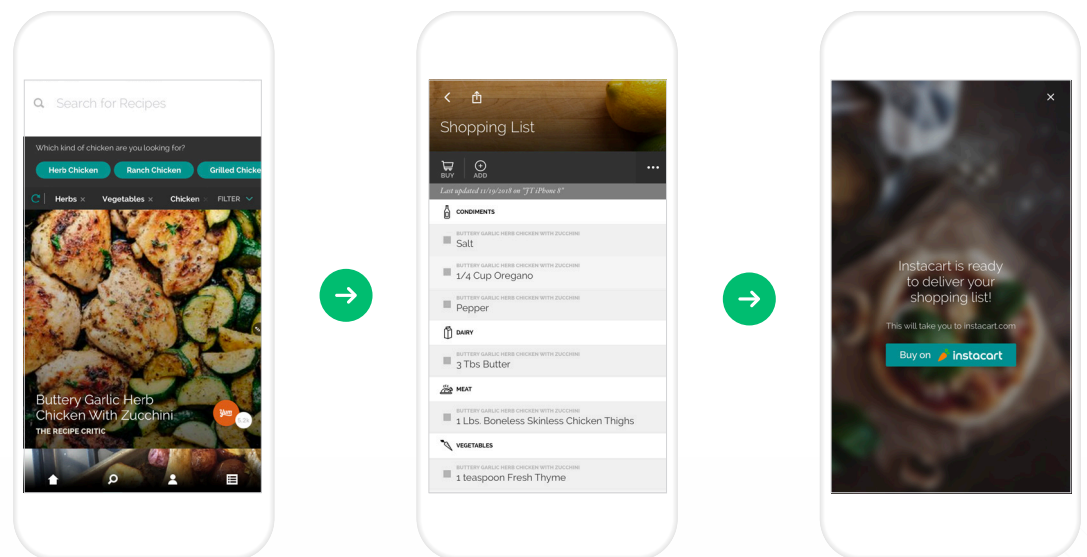
*From recipe to shopping list to purchase in three short taps*

You should also keep in mind the advantages of deferred deep links, a proven technology that allows users to route directly to a specific destination post-install. They're like an EZ-pass through onboarding and straight to conversion and user love.[18]

- **Limit the number of screenshots**. Your interactive tour does not need to include every fancy permutation of your app. Just the beautiful basics. This follows the strategic advice previously mentioned: swipe left for long tutorials. As a matter of principal, keep your topics fixed on early-stage needs. Showing edge cases too early can distract users from completing an initial (and usually basic) conversion, purchase, or other goal. As a product manager, you should work with your design team to help ensure any screens you share are pixel-perfect.

Here's an example from Rent the Runway, in which four screens deliver the most essential details of the app's core use cases:
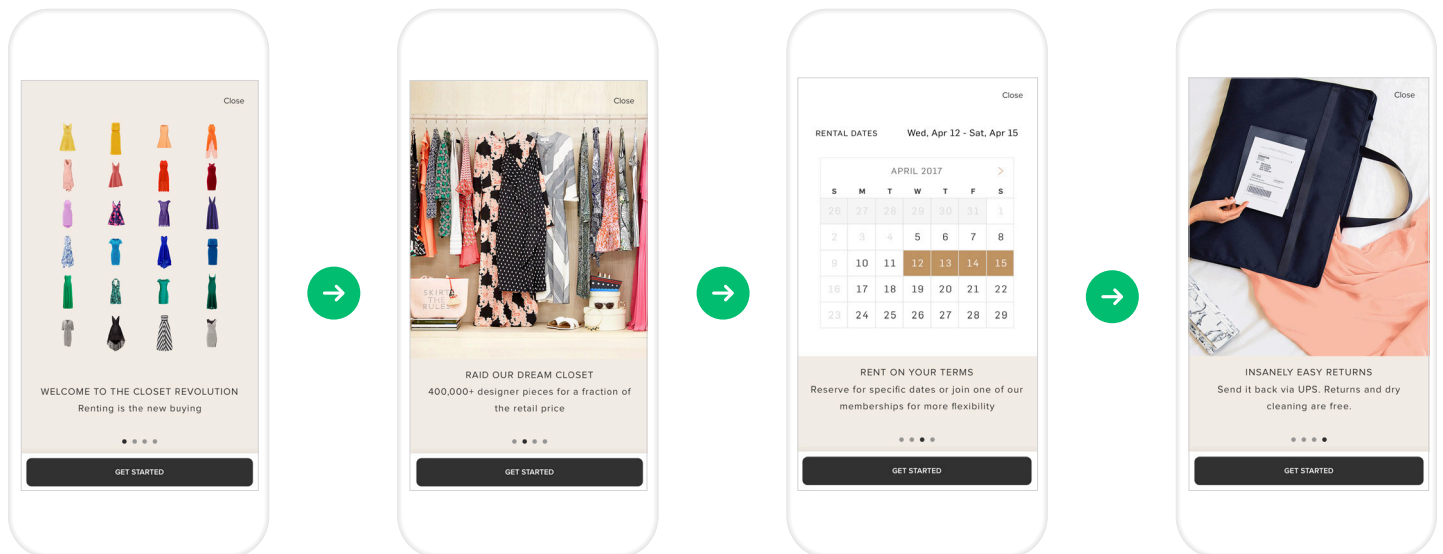
*Effective onboarding: accurately linked, simple, fast, and visual*
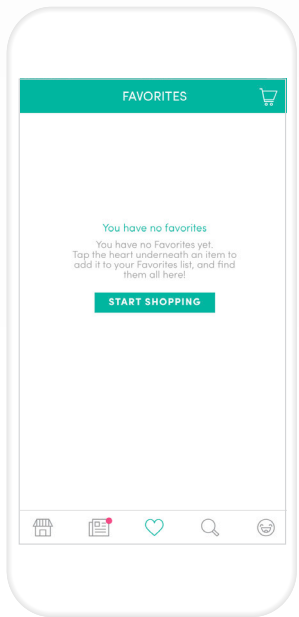
- **Make empty screens your friend**. *Nature abhors a vacuum* pertains to physics as well as apps. It's OK to present users with an empty screen. In fact, this can be a terrific motivator to onboarding. One common example is photo apps, where plain copy often prompts users to fill blank portfolios with original work. In this case, an empty screen does not always need to be incorporated into an onboarding sequence, but can instead exist on its own until a user decides to fill it. A related tactic is to reach users via complementary channels such as Universal Email with "We haven't seen you in a while," "Play your first game today," or another reminder. As an example, Boxed provides a simple prompt for users new to its app.
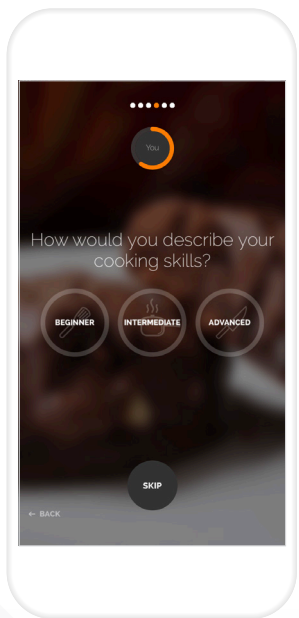
- **Introduce a success rate or achievement bar**. Make onboarding progress clear to users. This step is both respectful and informative, as it helps users manage their time and commitment to onboarding, and assists product managers in determining where users might be commonly abandoning a sequence. Also: Don't forget to celebrate wins, both on-screen and in follow-up emails. Note the progress circle in the screen at left, also from Yummly.

- **Get personal (and keep it that way)**. In your quest for speed, don't sacrifice integrity or convey a sense that you might be putting users at risk. Be upfront. If your app requires personal information to deliver value, make your reason clear. Consider this: 82% of app users feel it's important to understand why disclosing personal information is vital to their onboarding process. [19] Saving a few extra seconds by not being transparent upfront will cost considerably more time and energy farther down the line.

The Knot provides an example of an app that keeps users in control of their personal information until they're ready to share it, all while striking a friendly tone.
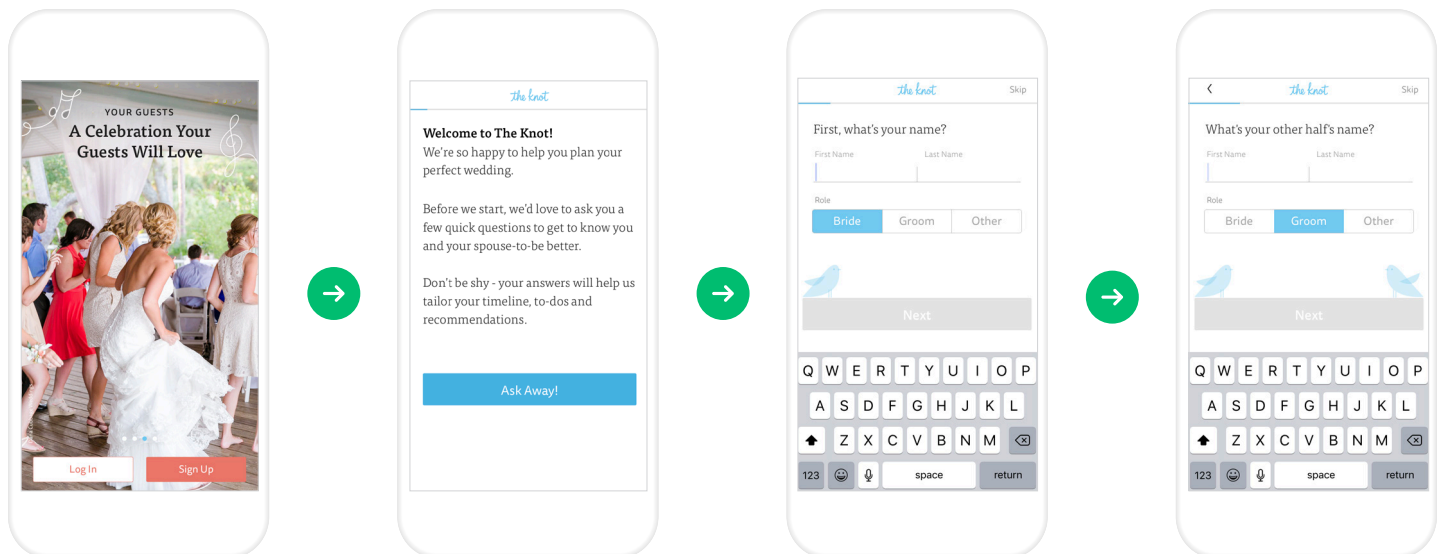
Landing the basics for a personalized experience

Market data suggest that doing everything you can to convert low-cost mobile web traffic into high-conversion app engagement is smart. Onboarding is the vital step in this process. When considering that users view 285% more products, convert at a 120% higher rate, and spend 11% more per purchase in app than on mobile web, it's hard to overestimate the impact of strategically sound onboarding.[20]

• **Spam was never in style**. Enticing as it may be, the long-term advantages just aren't worth it. Go ahead and send users short emails with clear calls to action and benefits. When you do, remember that time should be your ally. Avoid lengthy commentaries on every last feature, case study, and news item. Reach out and spur additional onboarding activities, yes; pummel and guilt-trip, no. The email below from Boxed is a good example of these concepts in action.
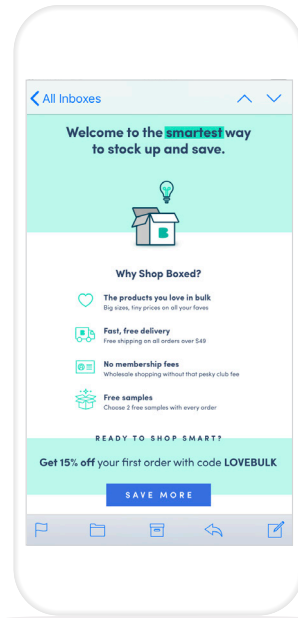
App onboarding expectations have never been higher. One reason is that comparisons are horizontal and not confined to an app's immediate competitive alternatives. With few exceptions, users will rate app onboarding experiences on one platform (for example, in-app on phone) against the top experiences on the same platform, irrespective of whether or not the experiences are in the same app category. Meaning that cross-platform onboarding requires multi-platform skills.

Section Four
Moving Forward

There's a mantra common among those who pursue big goals: The time is always now. Product managers navigating greater complexity at higher stakes can relate. Throughout this white paper, we've illustrated how and where you can maximize the upside of effective onboarding across web and app platforms. You should now be better equipped to deliver the unified experiences users demand and retain the users your business was built to serve.

Key Takeaways:

• **Time**: Speed wins. Do everything possible to onboard users quickly and weigh each step against the time required for users to complete it. Continually re-evaluate your process for every product refresh, striving to keep onboarding time to a minimum.

• **Control**: Place as much control as possible in the hands of users. Help them learn by doing and instill confidence that their data will be safely maintained, regardless of where interactions take place: on the web, in app, or back-and-forth.

• **Flow**: Every click and tap is an opportunity to reinforce the power and efficiency of seamless engagements. Eliminate speed bumps to conversions by ensuring links work across web, app, and email. This will help showcase the thoughtfulness and user-centricity of your product, accelerate your value exchange, and elevate your team's insights.

• **Simplicity**: Is your friend and complexity your bitter foe. Think benefits over features, and fewer steps, words, and images. Wherever there's an opportunity to use less (of anything) while preserving quality and user focus, maximize it.

- **Flexibility**: Your products are built for the long haul. The same approach should characterize the onboarding mindset you'll need to support those products. Evolve with the times by creating personalized onboarding options and adapting to new user and platform circumstances. By keeping your users' most valuable commodity in mind, your probability of success will only grow.

Where Branch can help

The advantages of scalable, tailored, cross-platform experiences are increasing by the day. To guide your choices, here's a snapshot of how product managers can meet common onboarding challenges with Branch solutions.

Onboarding Challenge	Branch Solution
• Driving target users into an app from multiple channels in a contextual way that helps ensure their onboarding and first experiences are relevant and seamless • Recognizing users and offering personalized onboarding that improves retention • Implementing onboarding solutions that don't require complicated engineering and marketing resources	**Journeys**, a solution for turning mobile web traffic into an organic app install channel with smart banners and audience targeting
• Enabling new users to easily begin onboarding from an email via deep links • Directing users from email straight to the correct onboarding sequence depending upon whether or not an app is installed • Reconnecting with users to highlight new features and offer an unbroken link to in-app experiences	**Universal Email**, a cross-platform solution for bridging email-to-app gaps and unlocking conversion gains
• Providing a frictionless transition from ad to onboarding • Increasing retention post-onboarding by connecting users with personalized offers to convert in-app • Retargeting users with direct links to in-app experiences including updated onboarding	**Universal Ads**, for optimizing campaign performance and tracking ROI using cross-platform data
• Powering install campaigns that connect audiences to product onboarding and learning opportunities • Applying post-onboarding rewards to new and existing users • Targeting users and incentivizing onboarding based upon customized rules and influencer analytics	**Referrals**, for inviting new users and measuring the impact of influencer programs

Disclaimer:

All screen images are used for illustrative purposes only and do not imply an endorsement of the featured brands or a specific affiliation with Branch. For additional information on how Branch helps leading digital brands deliver breakthrough results, contact the Branch sales team.

About Branch

Branch provides the leading cross-platform linking and attribution platform, offering solutions that unify user experience and measurement across devices and channels. Branch powers mobile links and cross-platform measurement to more than 3 billion monthly users across the globe, and is a trusted cross-platform marketing, engagement, and measurement solution for over 50,000 apps — including Adobe, BuzzFeed, Yelp, OfferUp, and many more.

Sources

1. https://www.leanplum.com/blog/app-onboarding-best-practices/

2. The Branch Industry Report: https://branch.io/resources/white-paper/?res=The+Branch+Industry+Report%3A+Mobile+Trends+in+Focus, page 141

3. https://www.statista.com/statistics/271628/percentage-of-apps-used-once-in-the-us/

4. The Branch Industry Report: https://branch.io/resources/white-paper/?res=The+Branch+Industry+Report%3A+Mobile+Trends+in+Focus, page 8

5. The Branch Industry Report: https://branch.io/resources/white-paper/?res=The+Branch+Industry+Report%3A+Mobile+Trends+in+Focus, page 12; and https://www.emarketer.com/Article/Cost-of-Acquiring-Mobile-App-User/1016688

6. https://www.emarketer.com/content/mobile-time-spent-2018

7. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 119

8. The Branch Industry Report: https://branch.io/resources/white-paper/?res=The+Branch+Industry+Report%3A+Mobile+Trends+in+Focus, page 3

9. The Mobile Growth Handbook:: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 133

10. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 19

11. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 135

12. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 117

13. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 96

14. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, pages 152, 153

15. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 130 and https://www2.branch.io/WBN-2017MoEngageAppEngagement_LP-Registration/

16. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 23

17. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 68

18. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 221, 222

19. https://themanifest.com/app-development/5-best-practices-app-user-onboarding

20. The Mobile Growth Handbook: https://branch.io/resources/white-paper/?res=The+2018+Mobile+Growth+Handbook, page 163