

Onboarding Review Checklist

Use this checklist to audit and improve your client & user onboarding funnels.

Assumes a simplified wide-table model used in the Schema Theory PBIX: SignupDate, EmailVerifiedDate, AppInstalledDate, FirstLoginDate, FirstValueDate, TTFV_Hours, SignupWeek.

1) Objectives & Scope

☐ Define your primary activation event ('FirstValue') and time window (e.g., within 24 hours of Signup or before the end of the first session).

☐ Document your onboarding success metric: Activation Rate (Signup → FirstValue) and target range.

☐ Identify the top 1-2 Core Actions that best predict retention or paid conversion.

Notes: _____

2) Instrumentation & Data

☐ Implement milestones: Signup, EmailVerified, AppInstalled (mobile), FirstLogin, FirstValue; optional: InviteSent, BillingActivated.

☐ Every event includes a consistent UserId; timestamps normalized to UTC; client vs server sources documented.

☐ Capture acquisition data at signup (utm_source, utm_medium, utm_campaign, referrer_url).

☐ Identity resolution across web & mobile (identify/alias) is tested; no duplicate users after merge.

☐ Event QA: track % nulls, duplicate rates, and late-arriving events; maintain a validation query or dashboard.

☐ Exclude test/staging traffic (env flag or allowlist).

Notes: _____

3) Data Modeling

☐ Produce a wide-table for Power BI: one row per user with milestone date columns mapped from your events.

☐ Compute TTFV_Hours = (FirstValueDate - SignupDate) in hours; compute SignupWeek = ISO week start (Monday).

☐ (Optional) Build cohorts: by SignupWeek or month for trend analysis.

☐ Define data freshness SLA (e.g., updated hourly/daily) and monitor failures.

Notes: _____

4) Funnel Definition

☐ Document the exact step order and entry criteria (base = users who signed up in period X).

☐ Define edge cases: missing EmailVerified, mobile-only users (AppInstalled without FirstLogin), or invite-only flows.

☐ Ensure steps are mutually comprehensible and not redundant; split broad steps if needed.

Notes: _____

5) Benchmarks & Targets

☐ Set an Email Verified/Signup target (directional: 60-90%, product-dependent).

☐ Set an Activation/Signup target (directional: 20-40% for early-stage B2B; higher for simple utilities).

☐ Set a TTFV target (aim for < 1 session or < 24 hours).

☐ Capture a baseline snapshot date and agree on how success will be measured.

Notes: _____

6) UX & Friction Audit

☐ Count required fields at signup; defer non-essential info (progressive profiling).

☐ Ensure clear guidance and empty states that lead users to the Core Action.

☐ Measure time from install to login (mobile) and from login to Core Action; surface blockers.

☐ Provide in-product tips or checklists to nudge toward FirstValue.

Notes: _____

7) Messaging & Lifecycle

☐ Welcome message points directly to the next best action (verify email, install app, or perform Core Action).

☐ Create a 72-hour nudge sequence (email/push/in-app) focused on FirstValue, not generic features.

☐ Trigger referral or invite prompts after FirstValue (not before).

Notes: _____

8) Segmentation & Personalization

☐ Segment funnel by acquisition channel, plan/tier, device/platform, and region.

☐ Differentiate invited users vs. net-new signups; tailor prompts accordingly.

☐ Consider language/locale adaptations in onboarding content.

Notes: _____

9) Experimentation

☐ Maintain a hypothesis backlog mapped to specific funnel steps (with estimated impact).

☐ Set up A/B testing or holdouts; log variant exposure as an event.

☐ Define a guardrail metric (e.g., early churn) to avoid harmful optimizations.

Notes: _____

10) Dashboard Validation

☐ Reconcile PBIX counts with warehouse queries for each milestone.

☐ Confirm Step Conversion % = $\text{UsersAtStep}(i) / \text{UsersAtStep}(i-1)$ and Cumulative % vs base.

☐ Definitions reviewed with stakeholders; glossary stored with the report.

☐ Alerting in place for data freshness failures.

Notes: _____

11) Governance

☐ Assign data owners and a change log for step definitions and metrics.

☐ Centralize documentation links (data schema, SQL, PBIX).

☐ Establish a review cadence (e.g., monthly/quarterly) to update targets and steps.

Notes: _____

12) Next Steps Worksheet

Fill in actions to improve the funnel in the next cycle:

Funnel Step	Current %	Target %	Experiment Idea	Owner	Due
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Tip: prioritize experiments closest to the biggest drop-off and with the fastest time to learn.