

Onboarding Email Scorecard

Diagnose the 5 red flags and guide users to first value faster



The Five Signs Framework

Score each email 1-5 on these critical factors:

Sign 1: Outcomes Over Features

- 5 = Clear outcome + single next step
- 3 = Mixed features and outcomes
- 1 = Feature dump with no clear action

Sign 2: Segmentation & Targeting

- 5 = Behavior-triggered, segment-specific paths
- 3 = Some segmentation, mostly generic
- 1 = One sequence for all users

Sign 3: Pacing & Cognitive Load

- 5 = One action per email, well-spaced
- 3 = Some emails overloaded, timing inconsistent
- 1 = Multiple tasks per email, poor timing

Sign 4: Tone Alignment

- 5 = Matches emotional journey (reassure → support → encourage)
- 3 = Generally appropriate, some mismatches
- 1 = Overly hype or tone-deaf

Sign 5: Success Definition

- 5 = Clear milestones + progress indicators
- 3 = Some guidance on success
- 1 = No progress signals or milestones

Email Sequence Overview

Email #	Subject Line	Send Timing	Segment	Sign 1	Sign 2	Sign 3
1				/5	/5	/5
2				/5	/5	/5
3				/5	/5	/5
4				/5	/5	/5
5				/5	/5	/5

Overall Sequence Score: ___/125

Sequence Goals:

Examples: Welcome/Activation, Feature Education, Value Reinforcement, Trial Conversion, Retention Nudge

Notes & Hypotheses:

Key Strengths:

-
-
-

Major Opportunities:

-
-
-

Individual Email Analysis

Note: Duplicate this page for each email

Email #: _

Subject:

Content Analysis:

Primary message: Call-to-action:

Value promise: __

Sign 1 (Outcomes): ___/5

◦ Issue: _

◦ Fix:

Sign 2 (Segmentation): ___/5

◦ Issue: _

◦ Fix:

Sign 3 (Pacing): ___/5

◦ Issue: _

◦ Fix:

Sign 4 (Tone): ___/5

◦ Issue: _

◦ Fix:

Sign 5 (Success): ___/5

◦ Issue: _

◦ Fix:

Current Performance:

- Open rate: ____%
- Click rate: ____%
- Activation rate after this email: ____%

Recommended Changes:

1. _

2. _

3. _

Before & After Examples

Before: "Welcome to [Product]! We're excited you're here! 🎉 Let's get started by setting up your profile, inviting your team, connecting your data sources, and exploring our 15 core features..."

After: "You're all set. Your first insight is 5 minutes away. Click 'Connect Data' to see which campaigns drove revenue this month—no spreadsheets required."

Your Email Rewrites:

Current Email 1:

Improved Version:

Expected Impact:

Your Email Rewrites:

Current Email 2:

Improved Version:

Expected Impact:

Your Email Rewrites:

Current Email 3:

Improved Version:

Expected Impact:

Quick Wins Action Plan

Week 1: Rewrite Email 1

- Focus on ONE 5-minute value moment
- Remove feature lists and setup tasks
- Add reassuring tone: "You made a great choice"
- Test subject line for clarity over excitement

Week 2: Add Progress Indicators

- "You've completed step 1 of 3"
- "Users who do this are 3x more likely to succeed"
- Visual progress bars or checkmarks
- Celebrate micro-wins

Week 3: Create Behavioral Branches

- If clicked tutorial ›› advanced tips
- If imported data ›› next feature
- If stalled ›› extra help
- Set up automation rules

Week 4: Test New Sequence

- A/B test rewritten emails
- Track activation rate improvements
- Monitor time-to-first-value
- Survey users on clarity

A/B Test Planning

Test 1: Email 1 Rewrite

Hypothesis: Single value focus will increase activation

Control: Current email

Variant: Outcome-focused rewrite

Sample size: users per variant

Duration: weeks

Primary metric: Activation rate within 7 days

Guardrail metrics: Open rate, unsubscribe rate

Results:

Control activation: %

Variant activation: %

Statistical significance:

Decision: __

Test 1:

Hypothesis:

Control:

Variant:

Sample size:

Duration:

Primary metric:

Guardrail metrics:

Results:

Control activation: %

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Success Metrics Dashboard

Baseline Performance:

Trial-to-paid conversion: _%	Average time-to-first-value: _ days
Onboarding completion rate: _%	Support tickets during onboarding: _ per user

Target Performance:

Trial-to-paid conversion: _%	Average time-to-first-value: _ days
Onboarding completion rate: _%	Support tickets during onboarding: _ per user

Core Metrics Defined:

- Trial-to-Paid Conversion: % of trial users who become paying customers.
- Time-to-First-Value (TTFV): Average time until a user experiences primary product benefit.
- Onboarding Completion: % of users finishing key onboarding tasks.
- Support Tickets during Onboarding: Volume of issues raised by new users.

Core Trend Analysis Checklist:

- Are TTFV and conversion moving in the same direction?
- Did ticket volume change proportionally to onboarding completion?
- Is there a specific email send day that correlates with churn spikes?

Iteration & Learning Plan:

- Re-score the sequence quarterly or after major updates.
- Conduct A/B tests on high-impact emails (e.g., Email 1 & Trial End).
- Collect qualitative feedback from churned trials and successful users.
- Share insights with Product & Support teams for holistic improvement.

Monthly Reviews:

- Month 1 check-in: __
- Month 2 check-in: __
- Month 3 full analysis: __
- Next iteration planning: __