

Russell Webb | *Real-World Messiness of Product Design*



How to hook new customers

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When customers make a product selection there is a lot going on behind the scenes. **Desktop new product onboarding** carries a lot of functional weight, it is a prime candidate to wireframe. Capturing a large selection of unique steps requires enterprise-level wire framing skills.

Defining the Problem

Imagine a new or existing customer discovering your product. The onboarding process can often feel like a daunting maze. This is where detailed wireframes step-up, transforming a journey into a smooth, secure and clear experience. Early decisions were made to leverage a pre-existing Design System. High fidelity wireframes became the way forward with Figma as the wire-framing tool of choice.

Onboarding Flow & Development Preparation

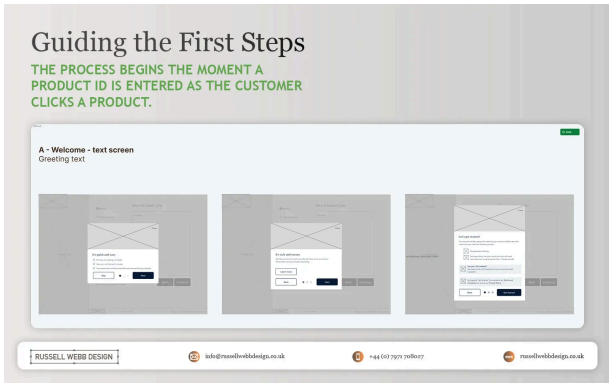
Process flow diagrams were thin on the ground, little research was available and there was a lot of ambiguity. **This was an opportunity!** I took it on myself to deeply understand how personal details were collected, how email and SMS validation data flows worked, understand business goals and success metrics, so the technical team can move forward. **This was a calculated risk!**

Segmenting the UX Wire-framing Process

1 – Guiding the First Steps

Personal details | Pre-registration

The process begins the moment a product ID is entered as the customer clicks a product. These wireframes propose a gentle walk-through, hand-holding the customer and setting clear expectations. As personal details are collected, the system identifies pre-registrations, streamlining the experience. For unrecognised products, the UI gracefully handles the situation, preventing frustration.



2 – Building Trust and Security

KYC process | Tax jurisdiction | IDV | GDPR

Next, the validation screen requests a unique member ID, followed by a secure OTP process. This includes both email and mobile verification, paving the way for a robust KYC process.



The customer identifies their tax jurisdiction, providing identification proof, as part of a seamless IDV (Identity Verification) experience. To ensure compliance with regional regulations, the system also gathers marketing and accessibility permissions, adhering to GDPR guidelines.

3 – Personalisation Meets Regulation

Investment pledge | NI (UK)

This joined-up onboarding process seamlessly transitions the customer from initial product selection to specifying their investment pledge. Furthermore, their National Insurance ID is verified, ensuring 360° compliance.

4 – A Smooth Conclusion

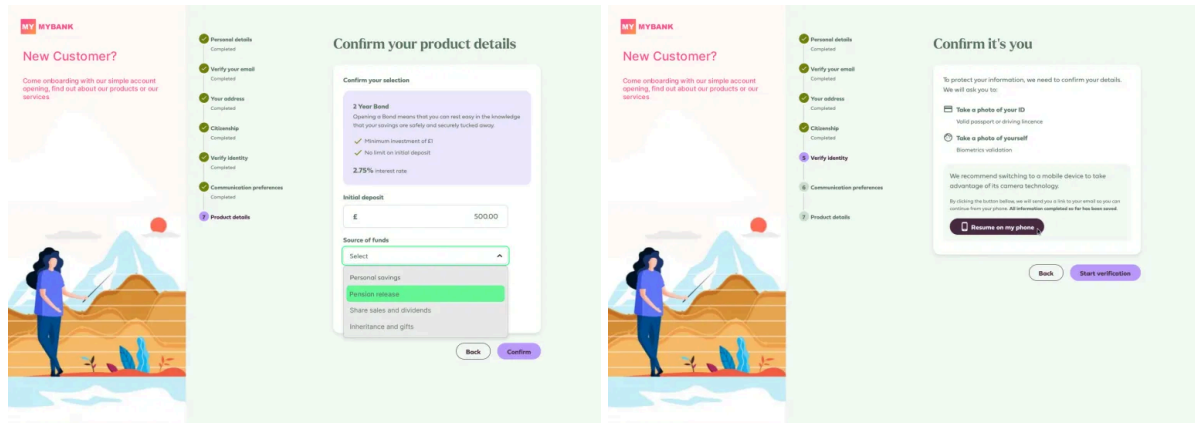
Confirm Message | Next steps

Finally, once all data is collected, it's securely transmitted to the BE. The FE then provides clear messaging, confirming a successful onboarding experience. This leaves the customer feeling confident and ready for next steps. Wires were shared for feedback across the team, including stakeholder, technical leads and PO's.

Fine tune the results

UAT Testing | Prototyping

Sneak preview of the final delivered User Interface (UI)



The process is still fresh, typically next steps are Usability Testing and Heuristic Evaluation. Prototyping, with QAs on standby, is another option to verify and test stakeholder feedback.

Conclusion and Impact

Ambiguity -> Clarity | Trust | Tailored

These wireframes don't just showcase a process; they tell a simple story of a complex customer experience. By prioritising clarity (onboarding steps) and security (verification and OTP) this onboarding journey fosters trust and loyalty from the very first click.

To see this question answered in its full glory, see:

<https://russellwebbdesign.co.uk/real-world-messiness-of-product-design/>

More info: <https://russellwebbdesign.co.uk/a-frictionless-wireframe-onboarding-journey/>

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