

SaaS Onboarding Customer Journey Map

Overview

This sample journey map outlines the key stages, actions, touchpoints, goals, and potential pain points for a new customer during SaaS onboarding.

Stage				
Customer Actions				
Touchpoints				
Customer Goals				
Pain Points				
Signup & Account Creation	- Visits website - Fills out registration form - Confirms email address	- Website landing page - Signup form - Email	- Create account quickly - Easy process with few steps	- Long forms - Confusing fields - Delayed confirmation
Welcome & First Login	- Logs in for first time - Reads welcome message - Sets up profile	- Welcome email - Dashboard - Profile setup page	- Understand next steps - Learn platform basics	- Overwhelmed by dashboard - Can't find support
Product Tour	- Completes guided walkthrough - Watches intro videos - Explores key features	- Product tour overlays - In-app hints - Tutorial videos	- Discover main features - Build initial confidence	- Skipped steps - Too much info at once
Initial Setup	- Connects integrations - Uploads data - Configures settings	- Setup wizards - Integration pages - Help docs	- Smooth setup - Quick access to features	- Technical jargon - Missing help resources
First Success / Value	- Completes first task - Sees results/reports - Invites team members	- In-app notifications - Email confirmations - Reports dashboard	- Achieve first value quickly - See progress and results	- Not sure what to do next - Low engagement
Ongoing Engagement	- Receives tips & reminders - Contacts support - Uses more advanced features	- Email - Chat support - Knowledge base	- Continual learning - Long-term value	- Dropping usage - Unanswered questions

