Designing UX for SaaS

Basics, Processes, Trends

UserGuiding

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Introduction

Until recently, I couldn't adjust the temperature of the water in the shower.

Really, I kept burning or freezing myself every time I had to take a shower, and this kept on going for years.

The problem is, and **I'm sure you've experienced this at some point,** you just can't get the temperature right, thanks to old-school knobs. The accuracy is pretty low, so you spend a good few minutes before you think you found that warm but also refreshing temperature, and just as you start to rejoice, the water gets hot and burns you and we're back to square one.

It's frustrating...

But don't forget that I've said "until recently" at the start, so this story has a happy ending.

Since "smart homes" are getting more and more popular, I gave in and had a digital shower
control system installed at my bathroom, which I can control through a, you've guessed it, **an app.**

After years of torture, burning, and freezing, I currently can adjust the temperature of the water without even stepping in the bathroom through the app. And when I get in there I'm welcomed by the calming warm water.

You see, my showering UX was awful. And even though newer models of manual knobs had more accuracy, the digital shower control system offered the perfect UX to me. Removed any pain points, eliminated frictions, and I was glad I had switched to their product.

You can, by looking at the example, notice that UX made a huge part of this buying decision. I quit the manual knobs because they had awful UX, I've chosen the digital shower control system because they've had a perfect UX, and if their UX remains this way, I'll be their customer forever.

For the SaaS industry, where switching products is much easier because, well, cloud; and where the competition is getting more and more fierce everyday, UX can be the first thing that can make or break your company.

And creating the perfect UX is not as easy as introducing an app to your users in SaaS, there are a dozen challenges that are unique to SaaS products.

We'll help you define these challenges and find ways to overcome them, and introduce you to the popular concepts in UX and SaaS.

In this ebook, we'll go over:

- the basics of UX,
- what the trends look like in 2021,
- the value of UX to SaaS businesses,
- UX design processes for SaaS products,
- and tips and tools to significantly improve your processes.

Implementing a well thought UX can help you reduce customer churn rates, streamline the user journey, and eliminate user frustration. Achieving a well-balanced UX design for SaaS might be a challenge. The service needs to be personalised, easy to use, and appealing at the same time.

Chapter 1

UX Basics

Every sound structure, ever, is built from bottom up.

So, in this chapter, we'll go over the basics of UX and what the trends look like in 2021.

First things first:

What exactly is UX?

UX is the abbreviation of User eXperience.

It refers to an individual's thoughts and feelings when using a specific product or a service. It aims to heal and naturalize the interaction between humans and products to create smooth experiences.

UX can also be referred to as the process of assisting the user to complete goals within a product with planned interactions.

UX extends traditional human-computer interaction (HCI). It proposes a practical solution by addressing the user's intent, pain points, journey, usability, etc. A single design discipline does not guide UX. Instead, it needs a cross-disciplinary viewpoint that considers different aspects of the brand, business, community, user group, etc.

The term UX was coined in 1993 by Don Norman, the then "User Experience Architect" of Apple.

However, UX existed years before the field had a name. The oldest solid example of "making design more human-friendly" on the records was when Bell Labs hired a psychologist to design phone systems.

We can't say it originated from there, but the field of UX drew more and more attention moving on.

4 Components of User Experience

#1: Process

The UX design process can be divided into four key phases:

- user research,
- design,
- testing,
- and implementation.

The UX design process typically takes place in that order. But these are continuous and interactive, thus, never-ending processes.

Throughout the design process, you discover new insights that lead you to rethink the design decisions. You are expected to review and repeat specific design solutions as you iteratively optimise and improve your design decisions.

#2: Interaction design

This component defines how users will interact with the design solution you've made throughout the UX process. Including evaluating target user groups' technical experience, user needs, personas, business strategies, etc.

Interaction design, also known as IxD, is responsible for communication and interaction between your product and your users. IxD is also useful when creating non-digital products, exploring how a user might interact with them.

It is the process of creating an efficient relationship between a product and its users.

#3: Elements

UX elements consist of five dependent layers. They start with an abstract level towards a solid one (from bottom to top).

1. Strategy

This layer defines the reason for the product, why you are creating it, who the users are, what problem they are facing, why users will be interested in it, etc. In short, you are here to define product use cases and business objectives.

2. Scope

You define product specifications and concepts in this layer. Ideally, it determines the product's features and content, what requirements should be met, and what needs to match the strategic priorities.

3.Structure

This layer is responsible for the information & interaction architecture throughout the system. For example, in this layer, you decide where to put the call to action (CTA) buttons, links, input fields, etc.

4.Skeleton

Skeleton describes the interface element's visual structure, appearance, and organisation of the component layout. It is responsible for how the user navigates through the information and how the information is presented. The goal is to make the UI as efficient and intuitive as possible.

5.Surface

It's the sum of all the design decisions you've made throughout the process. It determines how the product will look and chooses a suitable layout, typography, colours, information structure, etc.
The surface layer is visible to the end-user. Here you are dealing with the product's visual appearance, which is ultimately responsible for product acceptability and usability.

#4: Methodology

There are a couple of methodologies to follow while crafting a practical user experience, which I can't go into detail in a relatively short ebook such as this one.

But I can go ahead and name a few examples, such as: **Card Sorting, The Expert Review, Field Studies, Usability Testing, Remote Usability Testing, User Personas.**

UX Design in 2021 – What do the trends look like?

If someone told you sounds at the start of 2020, how significant our lives would change in less than 4 months, you'd call BS on the spot.

It has been a roller coaster for real. So many things happened, and they happened fast.

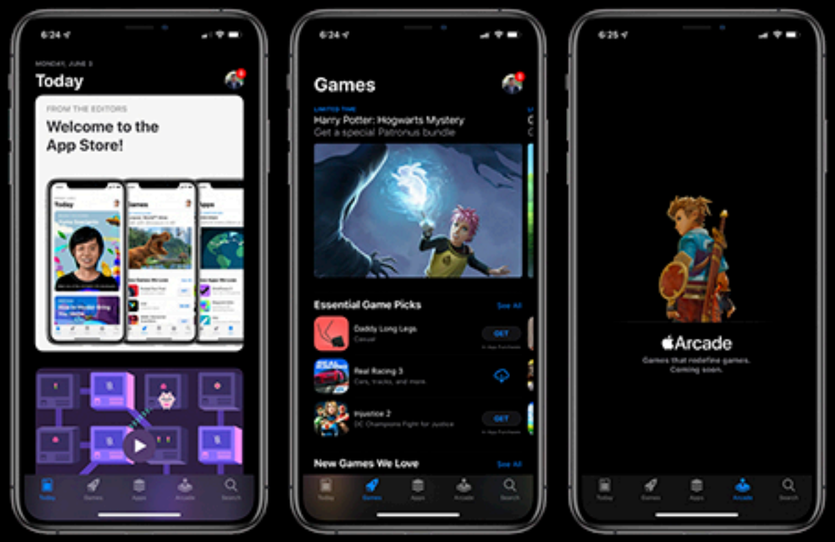
With the rise of virtual and remote working culture that came after the pandemic, UX/UI trends have seen a drastic change throughout the year. Online services are now more popular than ever, from meeting to banking and appointment booking. We are seeing a new wave of users transitioning from their regular physical services to digital services. In this chaos, UX/UI professionals will play a vital role in ensuring the transition is smooth and intuitive.

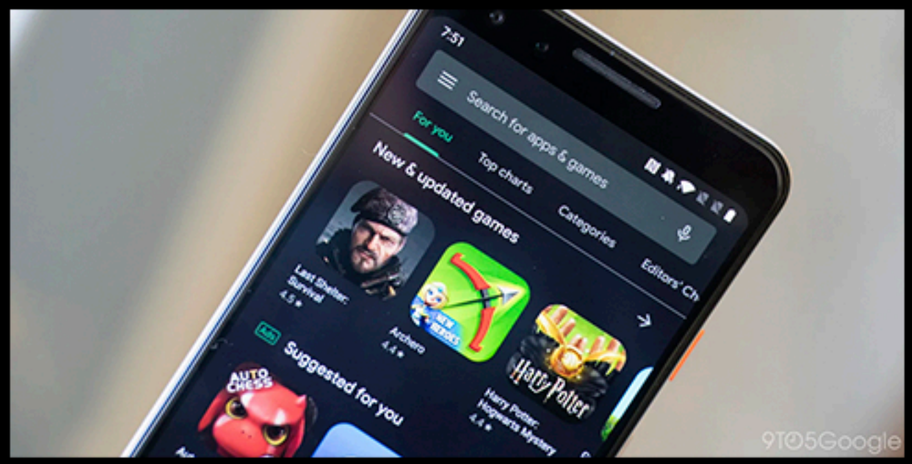
As a UX/UI practitioner, it is essential to stay informed about these forever changing trends to build cutting edge design solutions. So now, let's explore the top UX/UI design trends in 2021 in detail and see what influences the changes:

#1 Dark Mode

The rise of dark siders will likely be continuing in 2021 too.

The look is elegant, stylish and modern. As we're spending more time with our smart devices, dark mode plays a vital role in user experience. Dark mode saves the battery if the device uses an OLED or AMOLED screen, and also, It is better for reducing eye strain while using the device at night.



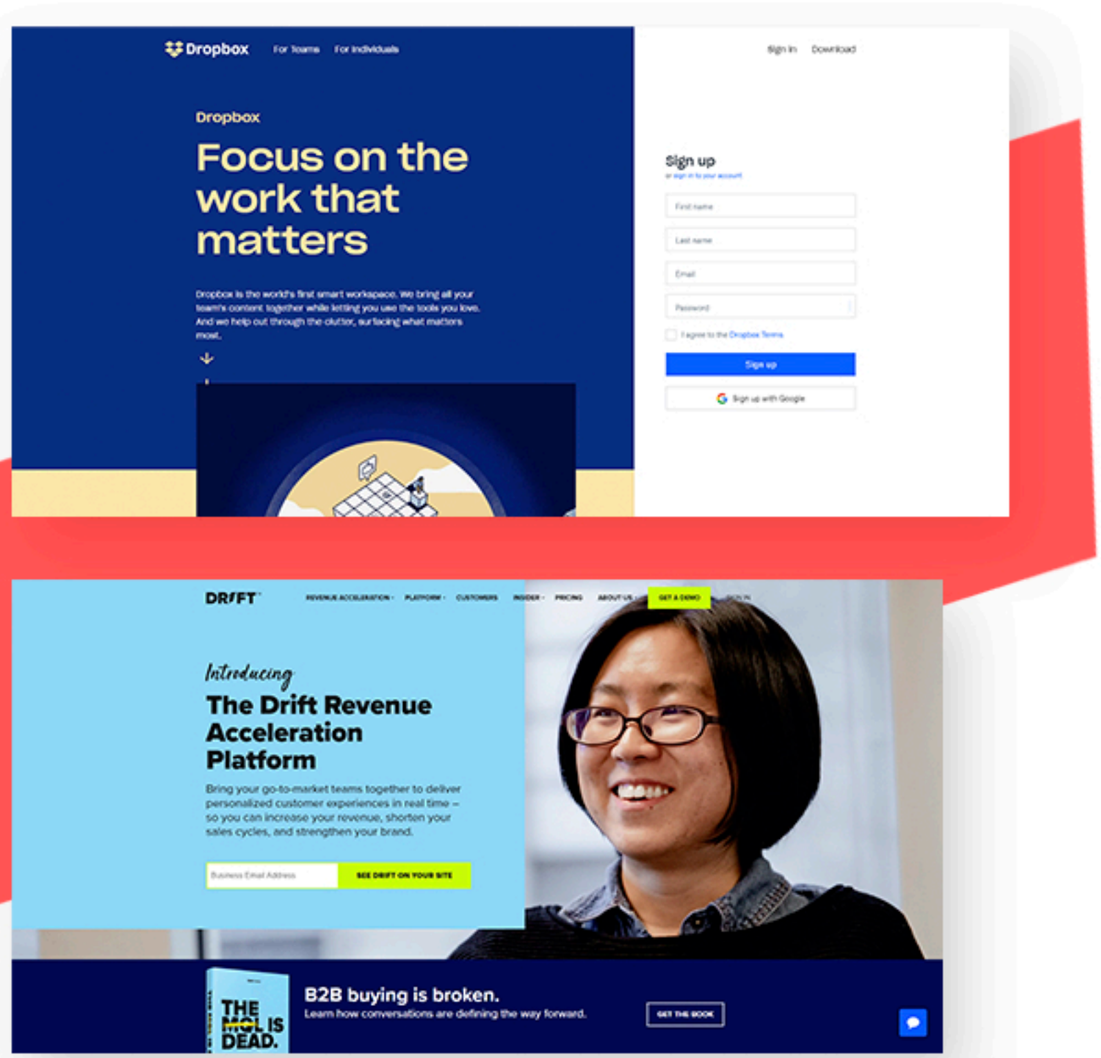


#2 Bold Typography

Web typography is getting bigger and bolder, especially for landing pages and microsites.

Bold typography is one of the easiest ways to grab users' attention.

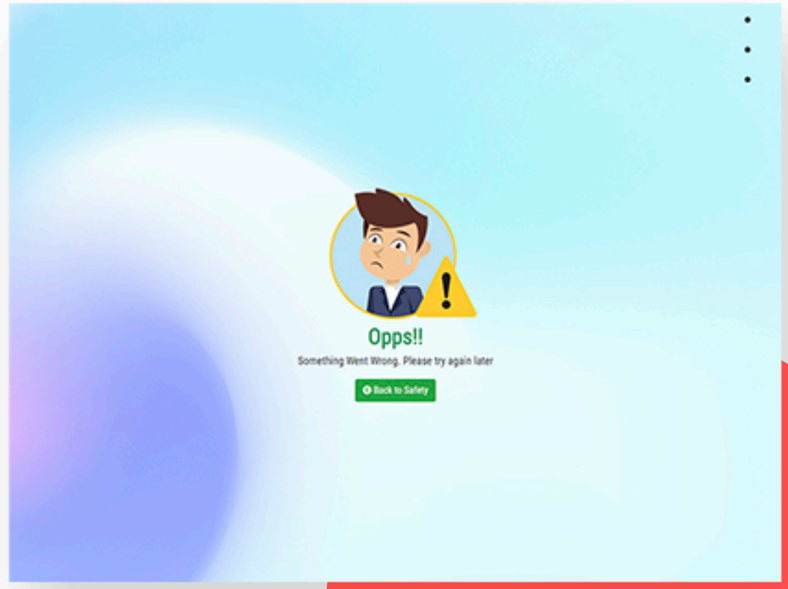
It contrasts perfectly with the design's intense nature, gives visual attention, and allows users to learn about the content.

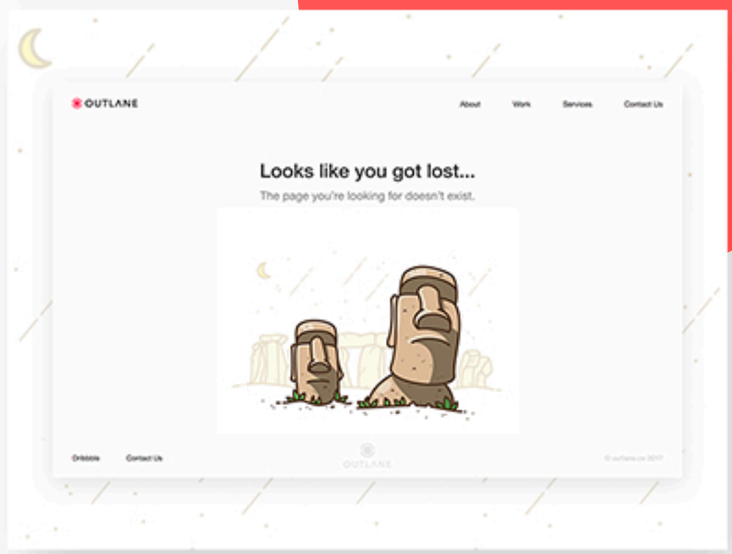


#3 Empty and error states illustration

Errors are scary, and emptiness is boring.

But they both are an integral part of a software product experience. So UX/UI professionals are taking a step forward to make them more exciting and more comfortable.





#4 3D Icons and illustrations

Admit it, everything looks better in 3D.

Except for Jaws 3...

Despite some drawbacks on memory consumption, 3D is trending in both mobile and web applications. In 2021, 3D elements such as icons and illustrations will definitely become more popular.

#5 Neumorphism

Neumorphism combines flat design and skeuomorphism. It is a visual style that combines background colours, shapes, gradients, and shadows to ensure UI elements' graphic intensity.

All that allows achieving a soft, extruded plastic look and almost 3D styling.

Neumorphism represents very detailed and precise designs, highlights, shadows, glows, etc. Attention to detail is awe-inspiring in this design pattern.

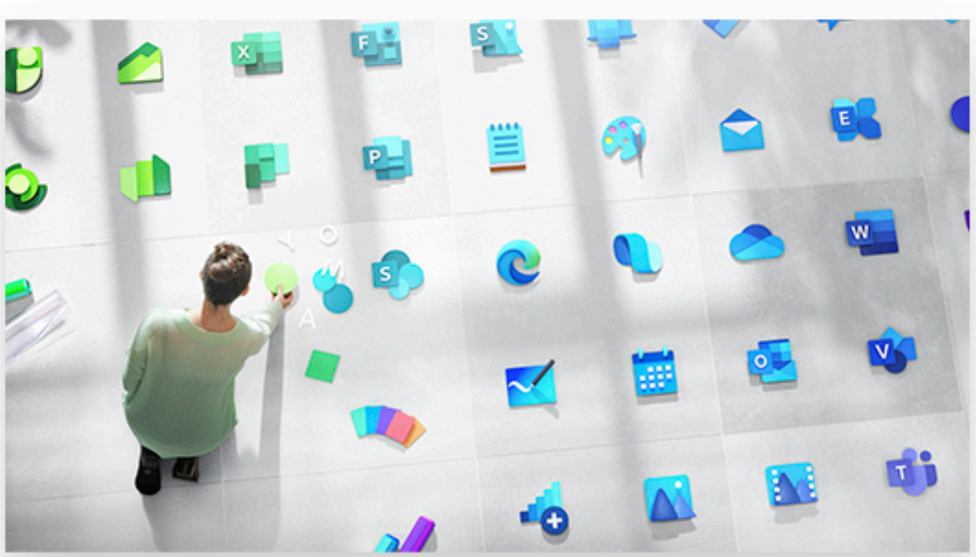
However, most UX experts think just the opposite. Neumorphism doesn't play nice with basic usability principles. It almost kills the intuitiveness and accessibility. And there aren't lots of real-world apps built on top of this style.

#6 Soft gradients

Gradients (or colour blending) are a gradual blending of multiple colours.

But gradients aren't limited to two shades of colours; you can blend how much you want. The gradient trend is versatile; it can be both bold and subtle. One of the exciting sides of gradients is, they add depth and life to an otherwise flat design. The trend of the smooth and soft gradient is in full swing in 2021. We will surely see more of them this year.

Microsoft's fluent design system and the new design approach by Apple in macOS Big Sur are two of the big pushes in gradient-based designs. Google also joined the party with redesigned logos of Gmail, Calendar, Drive, Docs and Meet.



Companies all over the world are paying more and more attention to the experience they're offering their users and how those users are interacting with their products.

Product owners, especially in competitive industries such as SaaS, are realizing that the only way to effectively grasp the attention of users and to completely satisfy them is through building a decent user experience without any friction whatsoever.

And who knows, one of these product owners can be your main competitor, looking to snatch your existing and potential customers...

Chapter 2

UX in SaaS

As I've said before, a bad UX can make your users run away from your business to a competitor that has a much better user experience.

And I'm not alone on this: 70% of enterprise CEOs see UX as a competitive differentiator.

In a highly competitive landscape such as SaaS, where you have to **sell your product to your customers every month**, you can't afford to lose the customers you've acquired. So basically, UX should be one of your top priorities if you're serious about growing your business and tipping over your competitors.

In this chapter, I'll go over what SaaS is, why it's buzzing more and more, and how UX fits in the picture.

Let's start with the basics:

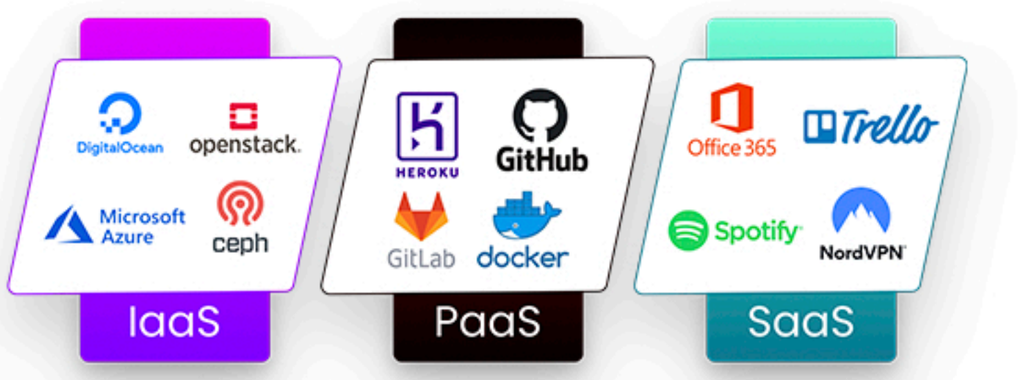
Software as a Service - What is it?

SaaS stands for Software as a Service.

It is a software service model where instead of buying a one-time license, you use the service on a subscription basis. This model is also known as on-demand software delivery. Netflix, Shopify, Adobe Photoshop, Adobe Lightroom, Microsoft Office are the best examples of modern SaaS applications.

Like everything else, SaaS software has its pros and cons. **Key advantages** of SaaS include stability, continuous update, and support. Also, this model offers a lower upfront cost than the traditional one-time license model. One of the **disadvantages** is that typically this type of software requires an internet connection to operate.

Cloud-based services are offered to consumers and companies by cloud providers. These services come in three types: IaaS (Infrastructure as a Service), PaaS (Platform as a Service) & SaaS (Software as a Service).



#1 IaaS - Infrastructure as a Service

It is a virtual provision of computing resources over the cloud.

An IaaS provider gives the customer the entire range of computing infrastructures such as storage, servers, networking hardware with maintenance and support. In this service model, customers do not need to manage their infrastructure; the service provider handles all the maintenance, supports and updates. According to Gartner, this service model is forecasted to grow by 26.92% ($65,264 million) in 2021, compared to $51,421 million in 2020.

#2 PaaS - Platform as a Service

PaaS is a cloud-based platform that lets the customer develop, test, and deploy different applications.

This service model simplifies the process of software development. Gartner says PaaS is expected to grow by 26.6% in 2021, compared to 2020.

#3 SaaS - Software as a Service

In this model, the service provider controls the entire application, which customers can access using a web browser or a companion software package.

SaaS does not require any installations or downloads in customers' existing infrastructure. Best examples of SaaS include Google Workspace, Microsoft Office 365, Box, Yandex for business etc.

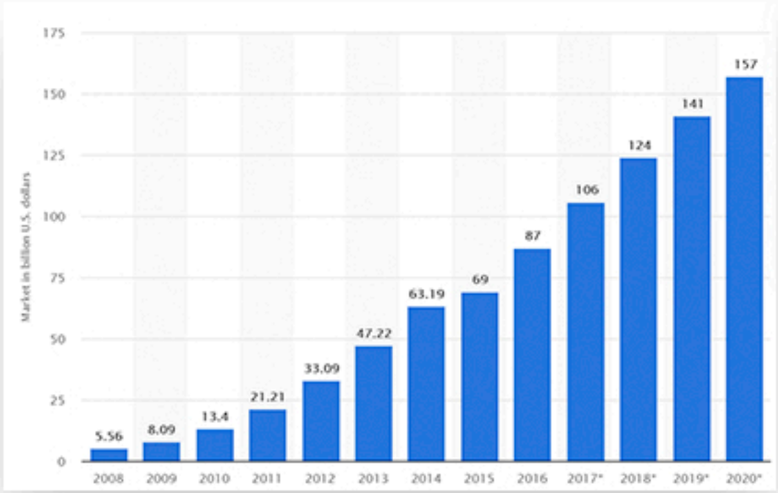
Future of Saas: why is it getting bigger?

Software as a Service (SaaS) is booming in the internet age, as expected. Gartner forecasted SaaS to grow $117.7 billion in 2021. Higher than any other cloud-based service model.

Here is the worldwide public cloud services end-user spending forecast (millions of U.S. dollars)

Service Model	2019	2020	2021	2022
Platform as a Service (PaaS)	37,512	43,823	55,486	68,964
Software as a Service (SaaS)	102,064	101,480	117,773	138,261
Infrastructure as a Service (IaaS)	44,457	51,421	65,264	82,225
Total Market	**184,033**	**196,724**	**238,523**	**289,450**

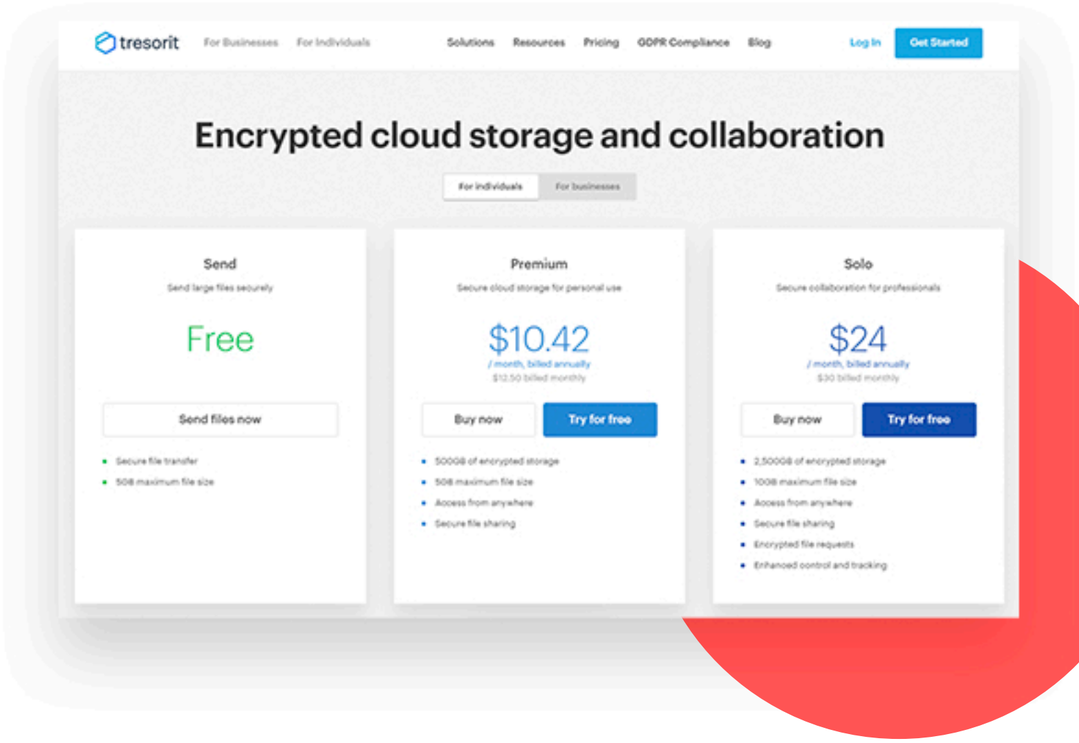
SaaS already has a proven track record for growth in the previous years too. According to Statista, the SaaS market size grew by 1071.64% in the last ten years (2010-2020).



The SaaS model is still growing thanks to many advantages that it offers both customers and business owners. There are tons of reasons why the SaaS model is the future, such as:

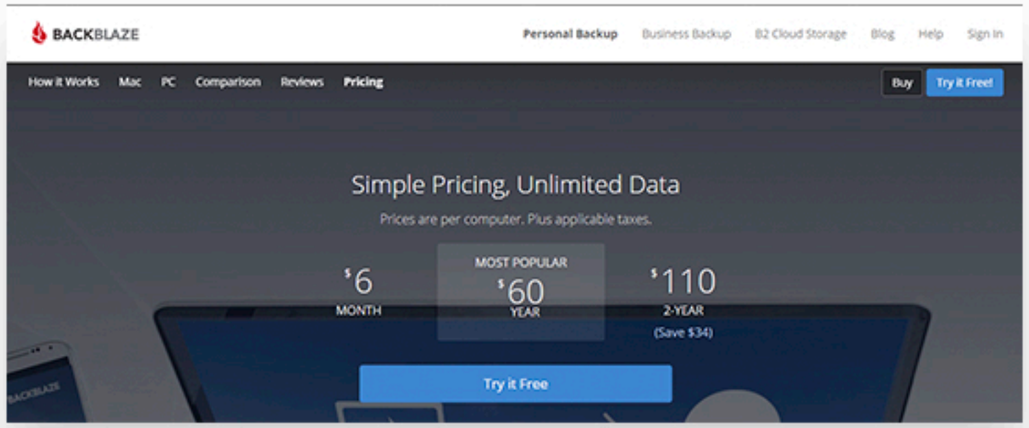
#1 It provides sustainable revenue for service providers.

Regular and predictable revenues are two of the critical aspects of a business to survive. Vendors can track their monthly payments to get estimated revenue. Subscribers can quickly pay the subscription price as payment is broken into smaller amounts. It is a win-win for both parties.



#2 Scalable pricing model

The SaaS pricing model is scalable with a long-term plan. The traditional pricing model may create problems in the competitive and constantly fluctuating market. SaaS provides balanced and adjustable pricing, which can be easier for customers to afford. The periodic billing cycle also helps users a lot.



#3 More focused on customer retention.

In SaaS, the pressure of concentrating more on new ideas and perspectives is relieved. The fundamental rule of SaaS is to enhance the level of service quality for current customers and convert them into paying subscribers.

Acquiring a new customer can cost six-seven times more than retaining an existing customer. Also, increasing customer retention by 5% can increase profits from 25-95%. So the real growth hack of SaaS is to focus more on retention rather than acquisition.

Is UX Design valued in the SaaS Industry?

SaaS is all about users.

So it's a no-brainer that the user experience is the first thing that needs to be focused on.

I just can't stress this enough: the SaaS market is competitive. If your users don't feel comfortable using your product or can't find what they are looking for, they will instantly leave your product for good.

Without any doubt, we can say that UX is one of the essential things in the SaaS industry. If you're just getting started or planning to start a SaaS business, you should consider investing more in UX. There are several solid reasons for that, such as:

Good UX increases customer acquisition and retention.

A well-designed product always attracts users and keeps them talking about the product. This word-of-mouth activation is one of the most incredible ways to acquire new customers. On the other hand, continuously improving UX ensures that your existing users are happy. Hence reduces the customer churn rate.

Intuitive UX helps the company to grow.

Increasing customer acquisition and retention means increasing revenue. There is an old saying; make it easy to buy something, people will buy it. So, invest a little more to make that navigation menu more intuitive, create a great onboarding experience or make the signup flow more frictionless.

These little things will help your users do more and achieve their goals faster with your product, resulting in more customers and revenue for you.

Intuitive UX helps the company to grow.

Wasting time and money is not an option for any companies. This is where UX solutions come into play to make the most out of your existing resources. An expert UX engineer can quickly detect inefficiencies early in the product development process. They do this by working alongside the devs to prevent the implementation of something that will waste time and money. Instead, they will be able to make the most of your resources to make your product perfect for your target audiences.

Well thought UX reduces development costs.

Many businesses see UX as a supplementary cost, but it isn't. In the context of overall product experience, short-term investment can lead to long-term savings. UX designers can create an early-stage prototype for the final product. So that developers can accurately assess the time and efforts needed for implementation. As a result, there is no need for wasting time and money. This way, we can quickly resolve possible problems before they become real problems in production.

Designing for SaaS; How is it different from designing for other products?

When designing UX for a SaaS product, there is little to no room for mistakes.

A single UX mistake can increase customer churn rate.

$$\text{CHURN RATE} = \frac{\text{Number of users who left}}{\text{Number of user at the beginning of period}} \times 100$$

People spend a concise amount of time exploring a product. So, the main challenge for UX designers is to make an excellent first impression within that small time frame.

There are 3 characteristics that make SaaS UX design different from other products.

1. Limited time to experiment

Unlike other product designers, SaaS UX designers get very little time to experiment.

There is no room for mistakes. Every design decision has to be well-thought and thoroughly tested before implementation. Typically SaaS companies need to develop and ship features faster to stay ahead of the competition. **So, the UX design process for SaaS has to be fast and precise.**

2. Heavy competitive market.

The SaaS market is heavily crowded, and there are tons of competitors to your business.

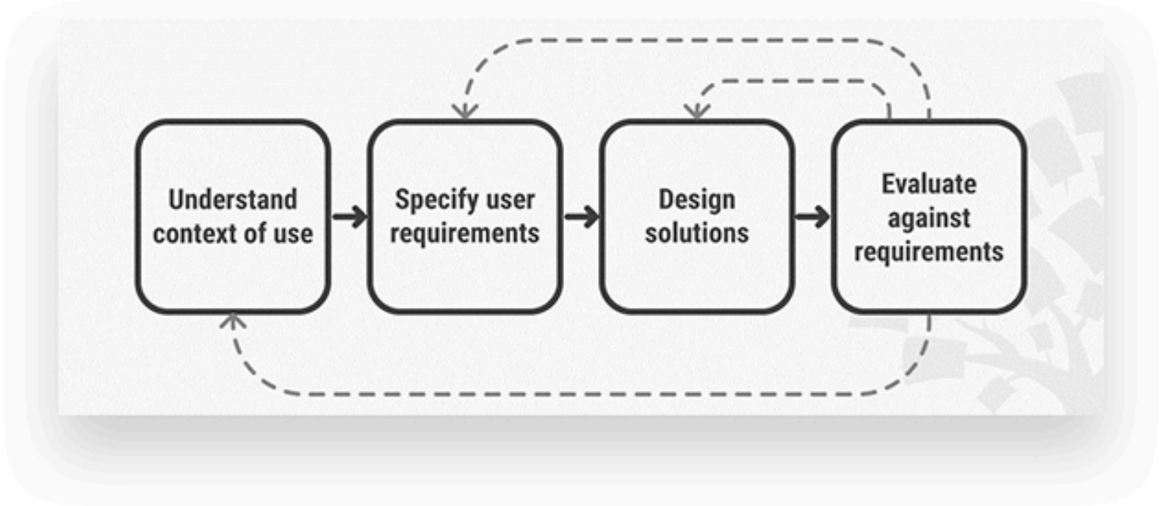
You need to offer extraordinary service and experience to stand out from the crowd—this is where a great UX designs comes into play. Intuitive navigation & a good onboarding experience are essential things that play a vital role in acquiring and retaining users.

On the other hand, a small UX mistake can make you lose ground in the market.

3. No option other than the user-centric UX approach

As we already discussed, SaaS is all about its user base. Unlike other product design, you need to take nothing but a user-centric UX approach. Embracing user feedback is essential when trying to design a high-quality SaaS application.

The SaaS products are ideally developed based on a comprehensive understanding of user goals, pain points and expectations. This approach ensures that rigorous testing is carried out to deal with problems that can trigger issues along the way.



Chapter 3

UX Design Process in SaaS

The UX design process in SaaS is not so different from a traditional one, but there is a little bit of spice in it that comes from the user-centric focus and the time limits.

In this chapter, we'll go over what a UX design process for SaaS products generally looks like.

Let's define the UX design process first:

What is the UX Design Process

The UX design process is an iterative process that explores the solutions to a particular set of design problems.

UX designers research each set of issues thoroughly and make a different design decision on every design process stage. Additionally, they also review and recommend changes to current design decisions.

Importance of the UX Design Process

Following a UX design process is an essential part of designing UX for SaaS. Here are some critical aspects of it:

- Product experience can be more efficient and transparent by following a standard design process. As a result, you get a tested and refined design solution.
- With each iteration, designers can revalidate design decisions from different perspectives to make them more refined.
- It makes collaboration with team members and stakeholders easier.
- It helps to find issues before they emerge into production and propose an effective solution.
- The UX design process helps us design a product experience that allows your SaaS users to achieve their goals more efficiently.

Stages of the UX Design Process

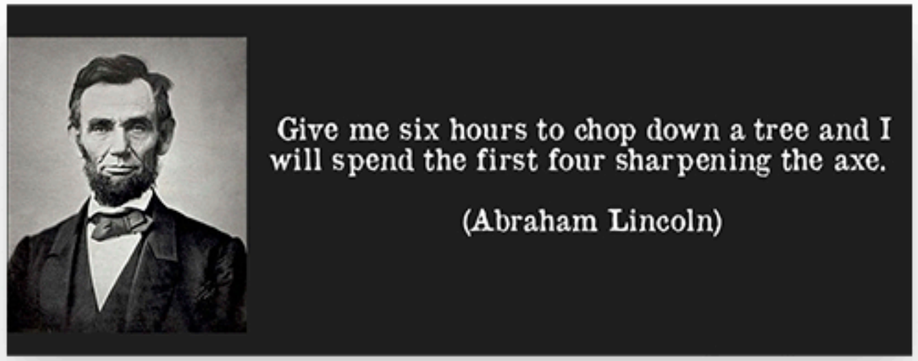
Remember, according to the team, the product, or the existing processes, the process might be different from what we've outlined here. But the core of the design process will almost always stay the same.

Typically the design process involves six stages:

Stage #1: Ideation

In this phase, you typically define the product.

Before you can build a product, you need to understand its context for existence. Like Abraham Lincoln once said:



The ideation phase sets the foundation for the final product. During this phase, your UX team brainstorms around the product at the highest level (basically, the product's concept).
This phase usually includes:

1. Stakeholder/user interviews.
2. Product value proposition.
3. Sketching of the concept ideas.

Stage #2: Research

You move to this phase after you define your product idea. And this phase typically includes user and market research.

Good research influences design decisions, and investing in research early in the process can save a lot of time and money. The knowledge and information you gather in this step will be responsible for the product fundamentals and functionalities. User interviews, surveys, workshops are some widely used research methods.

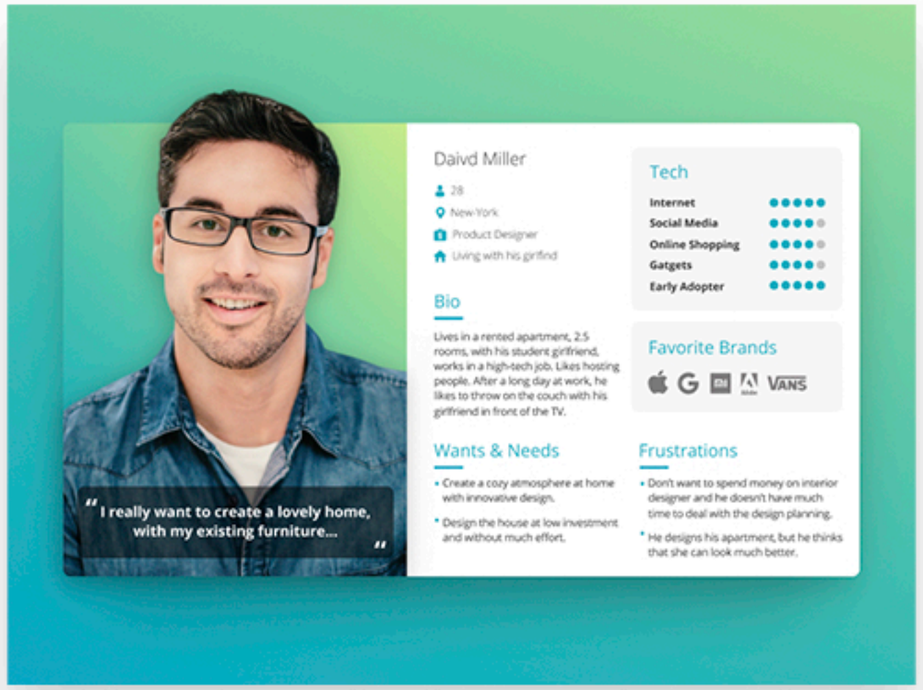
Stage #3: Analysing

You got data about the users, what they need, and what they expect from your research on stage #2. The next step is to analyse that data and verify the different ideas and concepts in your team.

This phase usually includes:

1. Defining user personas.

User personas are profiles of our ideal customers. As you design your product, you can reference these personas as realistic representations of the target audience.



2. Creating user journeys

A user journey map is a representation of the user's interactions with our product. The user journey map is crucial for building empathy and revealing opportunities to optimise the product experience.

3. Creating user stories

A user story is the smallest unit of work in an agile framework. It is a short, simple description of a feature told from the perspective of the user. It's usually defined with the following structure: "As a [user] I want to [goal to achieve] so that [motivation]." Example: As a business user, I want to invite all team members so that they can work on a shared document.

4. Creating a storyboard

Designers connect user personas and user stories using a storyboard. A storyboard visually predicts and explores a user's experience with a product. It involves a sequence of wireframes and is simple enough for everyone to create, modify and understand.

Stage #4: Design

When your project goal is defined, you know the user problem and your design solutions; now you move on to the design phase. In this step, you build the actual design.

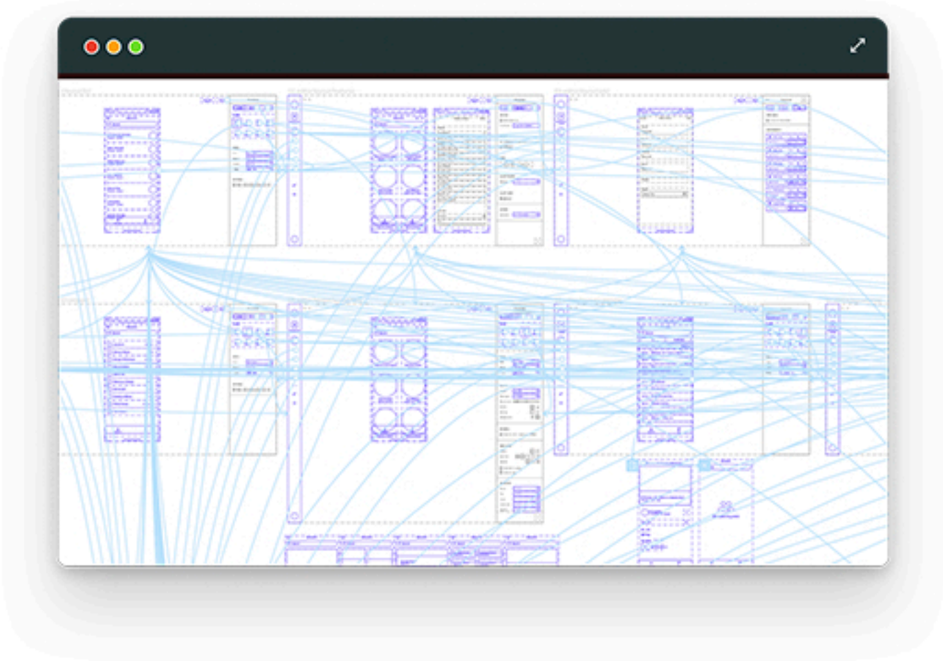
Additionally, you also create a design system at this stage. This phase typically includes:

1. Creating sketches

Sketching is the fastest way to visualise an idea. You can do this by hand drawing on paper, on a whiteboard or with a digital tool.

2. Creating wireframes and prototype

Wireframes are primarily about information architecture (IA). Prototypes are about the actual interaction between users and the product. You create wireframes and prototypes in this phase to act as a blueprint of the final product.



3. Creating UI:

UI designs are created using sketches, wireframes, and prototypes we made earlier. Designers provide production-ready methods to developers and other resources such as icons, images, colours, specs etc., in this step.

Stage #5: Launch

After successfully implementing the designs into production, you can now move to the launch phase.

In this phase, you publish the product to end-users. But the designers' duty isn't finished yet. You need to observe the real-world performance of your design decisions. Also, you need to gather user feedback and note down any UX issues they are facing. You will use this information in your next design iteration.

Stage #6: Iteration

The UX design process isn't a linear process; it's an iterative process.

The phases overlap, and usually, there are a lot of back-and-forths. With usage data and information in your hand, you go back to stage 1 and restart the UX design process to improve your product even further.

Chapter 4

Collaborating

Remember that scene from any superhero movie where the heroes work as one to defeat the villain?

The most recent example would probably be when every Marvel character worked together in the Avengers Endgame to kick Thanos' ass...

Well, just as it is needed to defeat a purple space tyrant, collaboration is crucial in overcoming the challenges that you encounter during developing products.

In this chapter, we will talk about some tips and tricks for effectively collaborating with your team, other teams and users.

Collaborating with your Team

Collaboration is a little bit easier when you're working with your team.

When done correctly, collaboration has many benefits, including greater efficiency, diverse perspectives, and better design solutions. But it takes time and effort for teams to learn how to collaborate.

There are 3 main aspects of collaborating with your team:

1. Know the goals and roles.

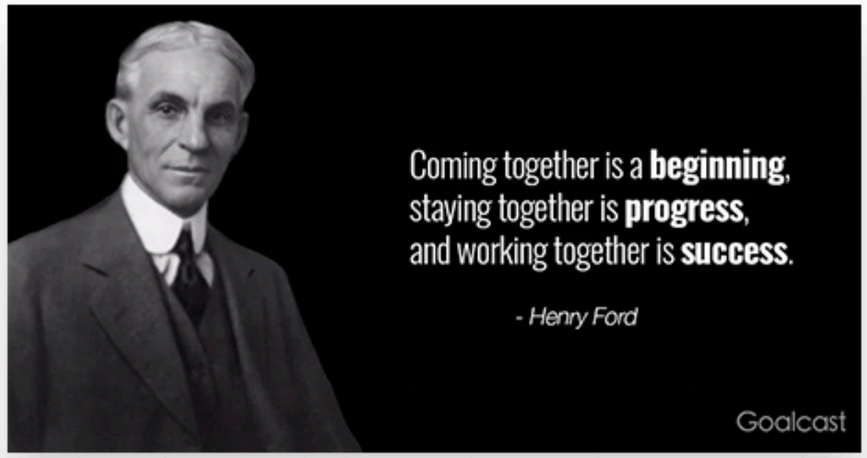
When the team comes together, everyone needs to know their team's goals and everyone's roles.

Then everyone can work independently on their designated tasks. When everyone knows what they are doing, the impact on the end product and what needs to be done— collaboration is much easier and effective.

2. Solve the problem together.

There is an old saying, "United we stand, divided we fall".

When you're working together, you need to face the challenges and obstacles together as a team. You can come up with a more efficient design decision when you solve the problem together.



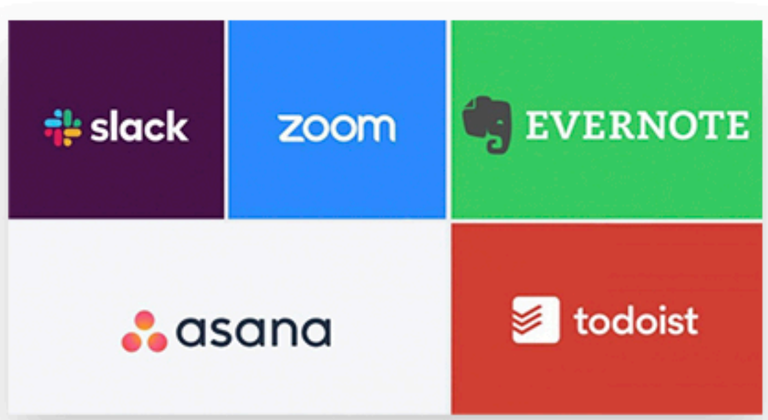
3. Use the right tool.

Tools that support remote collaboration are advancing rapidly.

Teams can talk via video, share screens and files and engage together in presentations using different tools. While choosing and using collaboration tools, make sure the basics are there:

1. Messaging System:

Your team needs a reliable communication platform. It is not just email but also a platform for them to quickly send messages and share files.



2. Cloud-based file storage and sharing system:

Design files can be large.

Versioning can be painful too. It is essential to ensure that you have a proper solution to save files and allow people to work in real-time. Cloud storages come into play in this situation. Most of the business cloud providers have good collaboration tools and secure file storage. Also, most of them support multiple platforms. So the team members can access and work on their files anytime, anywhere.

3. Cloud-based design systems that allow collaboration:

You can also try Cloud-based design systems such as Figma, which allows real-time collaboration. This way, you can cooperate on your designs.

Collaborating with Other Teams

Sometimes you need to collaborate with other teams, whether it's your marketing agency or your client's internal product team.

Here are some tips to make collaboration with other teams more efficient:

1. Make communication no.1 priority

Communication should be the top focus when working with other teams. Well-defined communication methods, style, and cadence can solve tons of problems beforehand. It will also help you to be familiar with other's team culture and ethics.

2. Know their team culture

Each team has their own culture. As a collaborator from another team, you need to know and respect their culture. Your working procedure might be different from theirs, but neither party needs to change their procedure. Instead, you can discuss and find a sweet spot to collaborate.

3. Do project coordination meetings

When you start collaborating with a new team, the work is often planned by a weekly meeting or project meeting. These regular meetings help keep all the team members well informed about the project and collaborate better. So don't forget to attend that Zoom meeting (or MS Teams or Google Meet or Skype or whatever!) more often.

4. Be human

When dealing with other teams and maybe juggling different time zones, things can sometimes get rough. If everyone agrees to some little compromises, it makes things easier and expected. Keep things human by recognising other teams' needs, culture, work process, communication preferences etc. Inter-team collaboration is more effective when everyone shows a little empathy for everyone.

Collaborating with the Users

Sometimes (if not most of the time), as a UX designer working for SaaS, you need to work closely with the end-users. This way, you get to know who your user is and see how they're interacting with your products.

Here are a couple of tips and tricks to collaborate with users.

1. Explain to the user what you need an why you need it.

The first rule for collaboration with the user is clear communication. Clear communication will help you to get precise and relevant information about user pain points and expectations. Most of the time, the user you're collaborating with is not from your team. So, don't let them feel abandoned. Make good relationships and let them know what you need and why you need it. You will always get some interesting information.

2. Keep it short and sweet.

You hate filling that long survey form, right? Your users hate it too. When collaborating with the user for interviews or surveys, keep things simple and easy to follow. Value their time and show empathy for the problem they are facing.

3. Never judge user opinion and choices.

Your users are here to teach you something, not the other way around. Your goal is to get as much information as possible and understand it from the users' perspective. It's counterproductive to judge users or try to educate them during collaboration. Keep things natural and easy for them.

Chapter 5

Designing for SaaS – tips & tools

So, we went over the basics of everything: UX, SaaS, UX in SaaS, doing UX in SaaS...

So, for the final chapter, we'd like to go a bit more advanced. In fact, we'll share the 3 tips that will instantly improve your user experience, based on our own experience designing various products.

You can actually implement all these tips into your design and design processes by the end of this week, and get quick results.

Speaking of being quick:

#1 Quicker the Signup, Faster to the value - Use an IAM Provider

A SaaS product needs to implement a secure and flexible user authentication system.

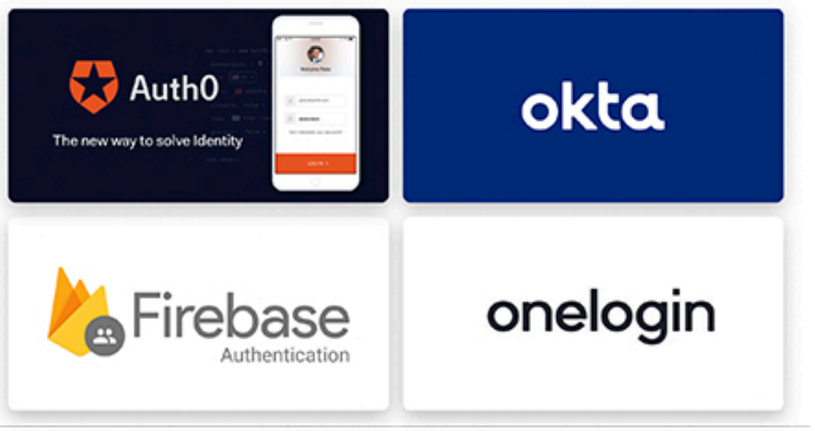
It requires a robust IAM (Identity and Access Management) system to handle different users across different service tiers.

But hey, what is an IAM in the first place?

What is an IAM?

IAM products provide tools and technologies for controlling user access within a product or organisation; typically, sign in, sign up, feature access etc.

The core objective of IAM systems is to provide one digital identity per individual. The IAM system gives you an easy and secure way to handle different user permissions and roles.



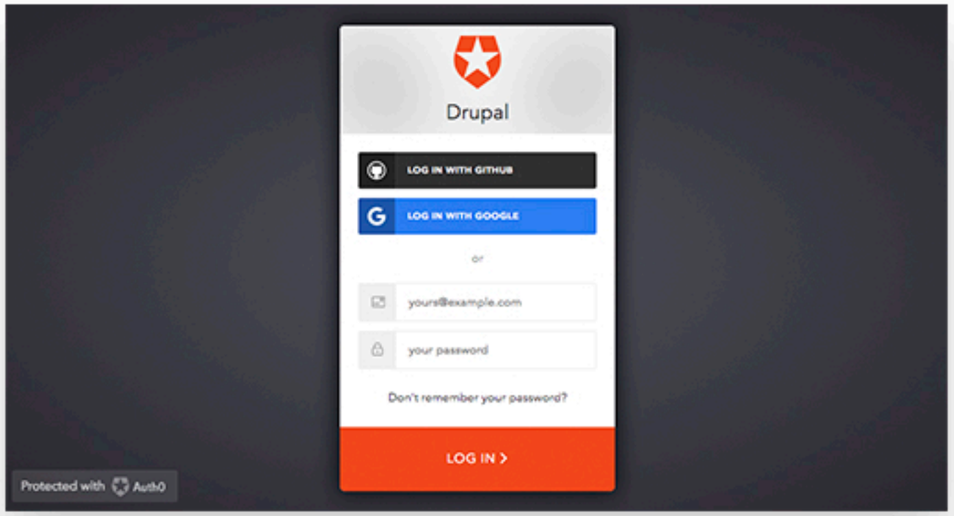
Why you need 3rd party IAM in a SaaS product?

Identity and access management in SaaS products are complex, both from the development and UX perspectives. To reduce user churn and increase conversion rate, you need to keep your products' signup/login system as frictionless as possible.

Also, whether it's for an investor sales pitch or shipping a groundbreaking MVP (Minimum viable product), you need to develop the product faster. 3rd party IAM providers come into play in this scenario. IAM systems give you an easy to implement authentication and user management system.

What is Auth0

Auth0 is one of the industry-leading IAM providers that is secure and easy to implement. It is a flexible, drop-in solution to add authentication and authorization services to your SaaS applications. Your team and organisation can avoid the cost, time, and risk that comes with building your solution to authenticate and authorise users.



Here are a couple of great features of Auth0 that will help your SaaS business grow

#1 Social Login
Auth0 simplifies login/registration by offering social login support. Social Login is a single sign-on for end users. Using existing social network providers like Facebook, Twitter, or Google, the user can access your software product. It simplifies login/registration for end-users and increases conversion.

#2 Passwordless authentication
Everyone hates passwords. They are complex, hard to remember and less secure. Passwordless authentication is now trending among SaaS companies. Auth0 provides the option to implement passwordless authentication in your SaaS product. So that the users can access your software using SMS or a one-time link sent to their email.

#3 Simple integration
Auth0 supports industry standards such as SAML, OpenID Connect, JSON Web Token, OAuth and OpenID. Auth0 allows you to authenticate and authorise apps and APIs with any identity provider running on any stack on any device or cloud.

#2 Double Down on Simplicity: Simple UI and Simpler Navigation

Have you ever been in a situation where you are browsing a website, suddenly want to go to a particular page or find something, but you're completely lost and have no idea where to click?

We've all been there...

When people browse a website or use a software product, they want it easy to use and navigate.

According to a survey by "Clutch", 94% of consumers say they want a website that is easy to navigate. Clutch conducted this survey to identify the top website features people value most. And because users are spending less time on a website, it only makes sense that consumers want more efficiency. Simple UI and easy navigation are two of the core things that can help you grow your SaaS software business. Let's talk more about them:

Keep the UI simple; The KISS principle.

KISS or "keep it simple, stupid" is a design principle that states that a system's design should be as simple as possible. Simplicity guarantees the highest level of user satisfaction and interaction.

Applying the KISS principle to your SaaS product design is simple (obviously). You can do this by following these guidelines:

#1 Use text over visuals to explain a complex concept

Avoid images to explain the difficult task. There is a saying that "a picture is worth a thousand words", but that's the reason you need to avoid the picture to explain something complex wherever possible and suitable.

#2 Use the correct vocabulary

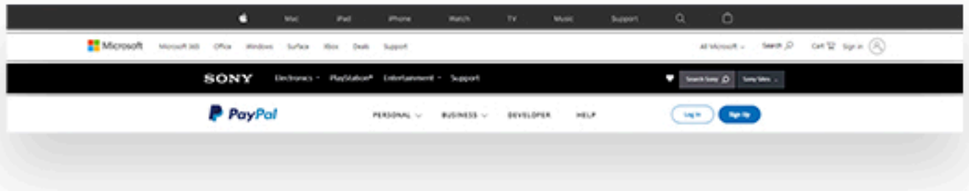
When designing a consumer SaaS application, try to avoid using highly technical or scientific terms. Sometimes those terms can require prior knowledge. Instead, use simple language to explain so that everyone can understand.

#3 Break down the difficult concept:

Any complex idea can be a lot simpler when broken down into smaller parts. For example, you have ten input fields in a signup form and can't skip any of them. Instead of putting them all on one long page, break them down into several small steps.

Making the navigation easier: Tips and tricks

The navigation menu is the list of links to the categories or features, typically presented as a set of links or icons.
Navigation is an essential part of any application as there are many things associated with it like accessibility, usability etc. Simpler navigation can increase user retention and engagements for your SaaS application. Let's explore some cool tips and tricks on how to make navigation simpler.



#1 Make them more visible

Make sure your navigation menus are visually distinct from the rest of the UI. The navigation menu is like a lifeline when users are lost. So, keep it visible and easily recognisable for better UX.

#2 Put menus in a familiar location

Users expect to find navigation elements where they've seen them before on other sites or apps (e.g., left side, top of the screen). Make these assumptions work for you; place the menus where users expect them.

#3 Different navigation for mobile and desktop

It is recommended to optimise the navigation for desktop and mobile separately. It may be an extra effort for devs and designers. But, it is better for UX as different devices have different capabilities of interaction. For example, hamburgers menus are well recognised on mobile but might not be suitable for desktop.

#3 Create an efficient user onboarding

According to [a study by Business Insider](), **it takes just three seconds** for someone to determine whether they like you or not.

All sorts of things, including intelligence and trustworthiness, are decided within this short period.

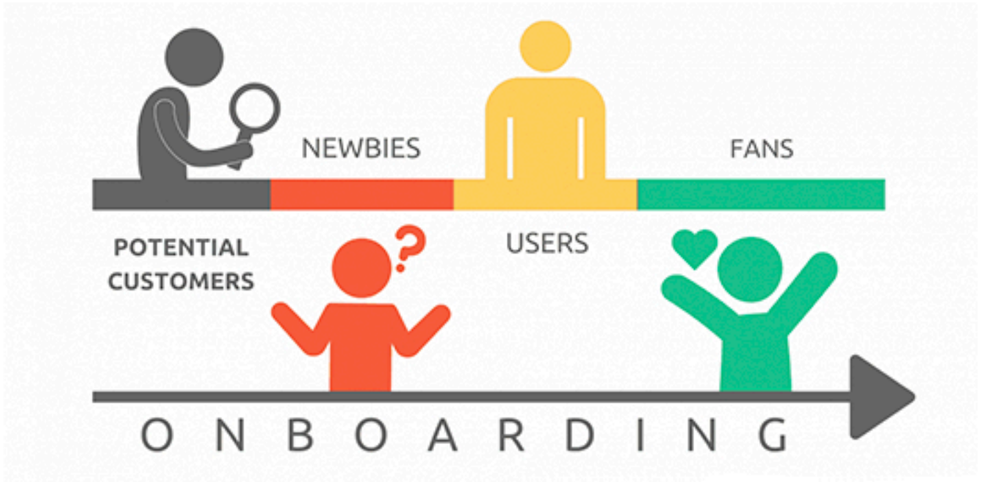
In the software world, especially in SaaS, it works somewhat similarly during user onboarding.

Once a user signs into your product for the first time, if they don't achieve any value soon, they will likely quit and never come back. This problem of user adoption can only be solved by establishing the perfect user onboarding process for your product.

But first, what is user onboarding?

Despite being a well-known term in the software world, different people have different understandings of user onboarding. Some people say it's about guiding new users; some say it is just some fancy quick tour UIs, while others imagine some skippable screens upon signup.

User-onboarding is a **process of orienting and familiarising new users with your product.** It provides the necessary directions and information to get started using the product. It is part of a process of transforming first-time users into loyal customers.



Why user onboarding is essential?

When users sign up for a product, they expect the product to solve a problem for them somehow.

So when they use the product for the first time, they should feel comfortable and find the "aha!" moment fast.

The "aha! moment" is when your users see the benefit they get from using your product, and they say to themselves, "Wow! This software is fantastic!".

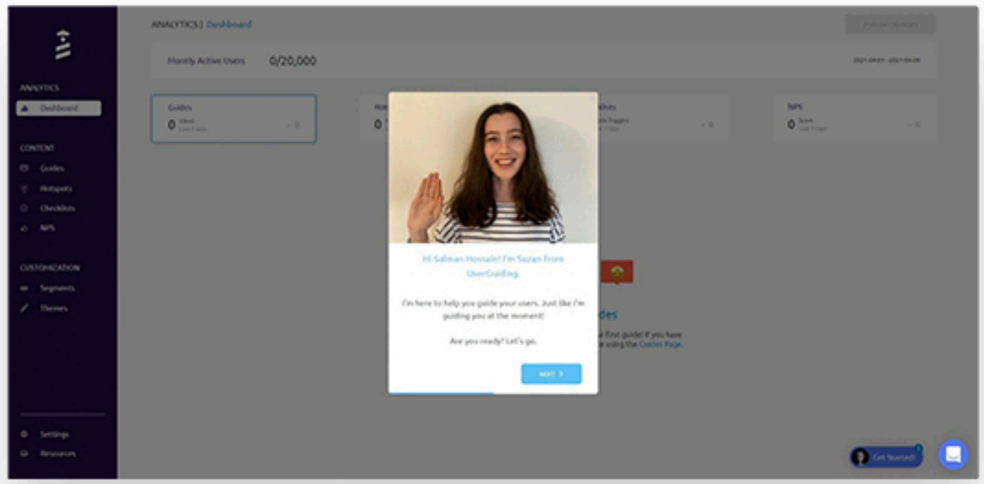
So, a well-designed user onboarding helps you quickly guide your users to the "aha!" moment and make sure they adopt your product early on.

How UserGuiding helps?

UserGuiding is a comprehensive platform to perfect your user onboarding with minimum effort.

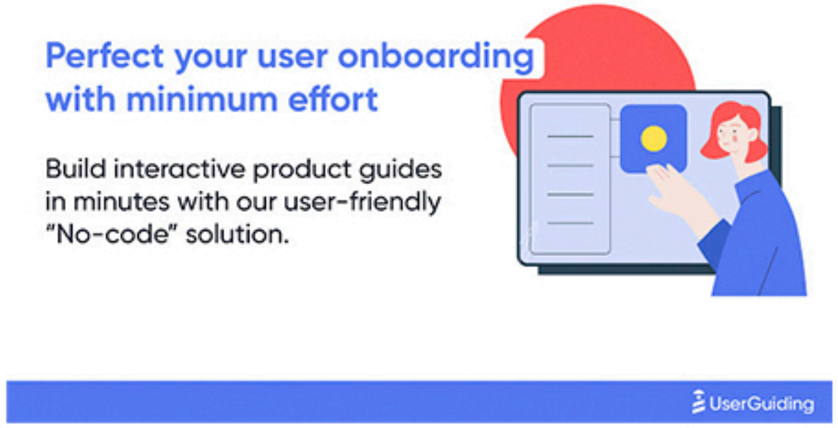
It lets you build interactive product guides in minutes with a unique "No-code" solution.

This solution allows you to prompt the right in-app experience to the right persona at the right time. Here are some excellent features of UserGuiding that will help you to design an efficient onboarding experience.



#1 No code platform

With UserGuiding, you can create and design user onboarding flows without any coding. This way, you can dramatically reduce your product development time and you can highlight your new features and create tutorial popups in minutes.



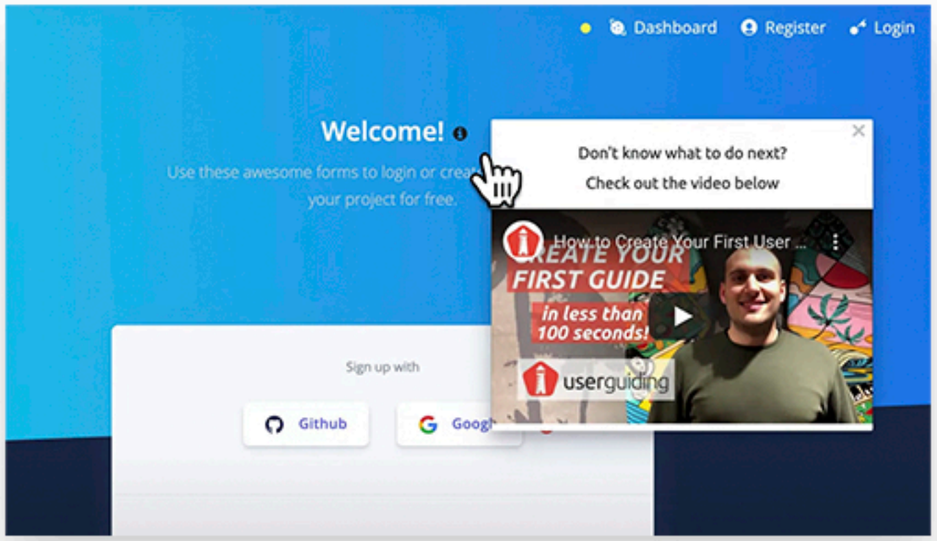
#2 Self-service customer support

UserGuiding lets you design fully interactive step-by-step guides for instant and result-oriented customer support. Your users can get support instantly anytime through an interactive help center.

3 Hotspots

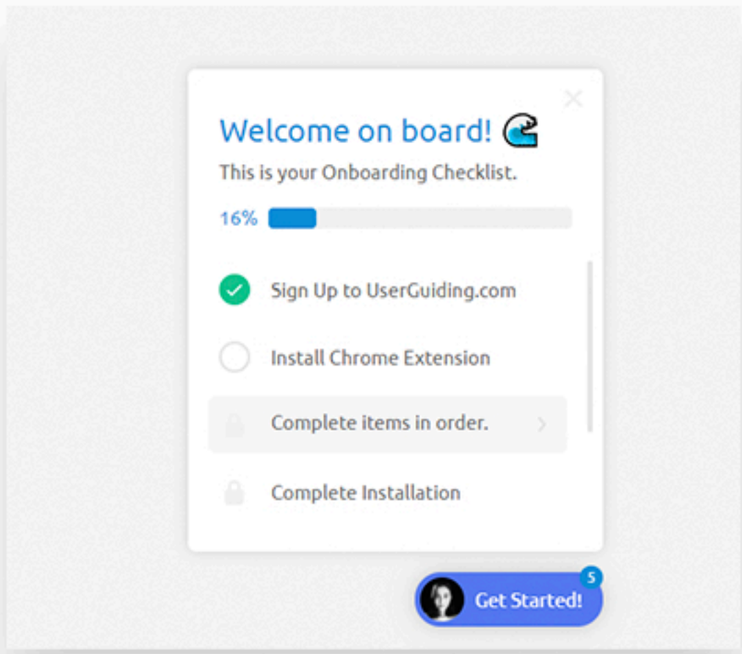
This user onboarding technique aims to point out specific features on the UI. UserGuiding can create static info-boxes to give users quick info about an element within your product. When the user clicks on the pulsating object, there's brief info showing up explaining the meaning of the element or action in detail.

Pro tip: you can even embed videos in hotspots.



#4 Onboarding Checklists

It is a feature that breaks complex processes into simple steps and keeps users motivated during onboarding.



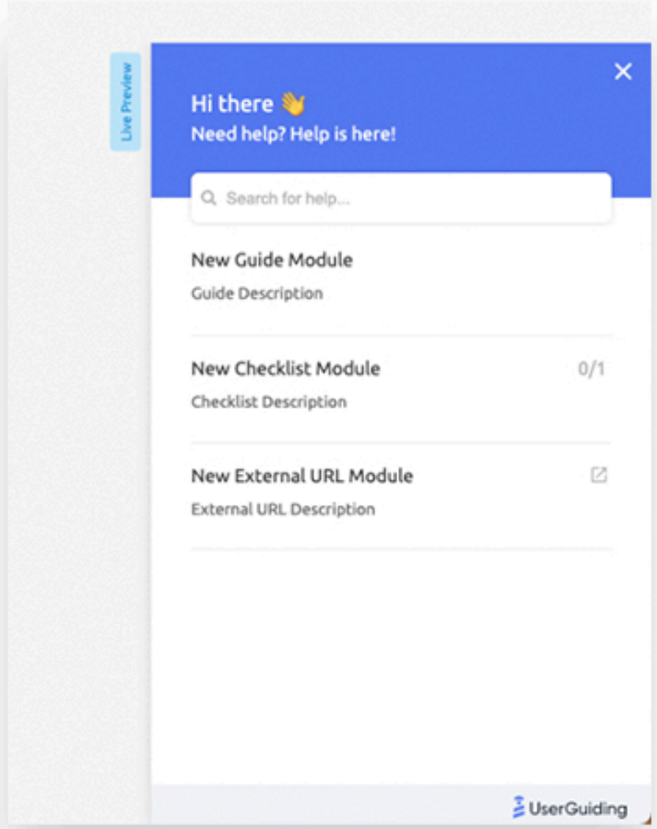
With UserGuiding, you can turn the customers into power users and show them what they are to do next with an exciting onboarding checklist.

#5 Resource Centers

If you want to convey the feeling of care to your users, you need to be there for them anywhere, anytime.

With UserGuiding's newest feature, resource centers, you can create a self-help center in your product and add your interactive guides as well as your knowledge base articles, and basically any webpage you want.

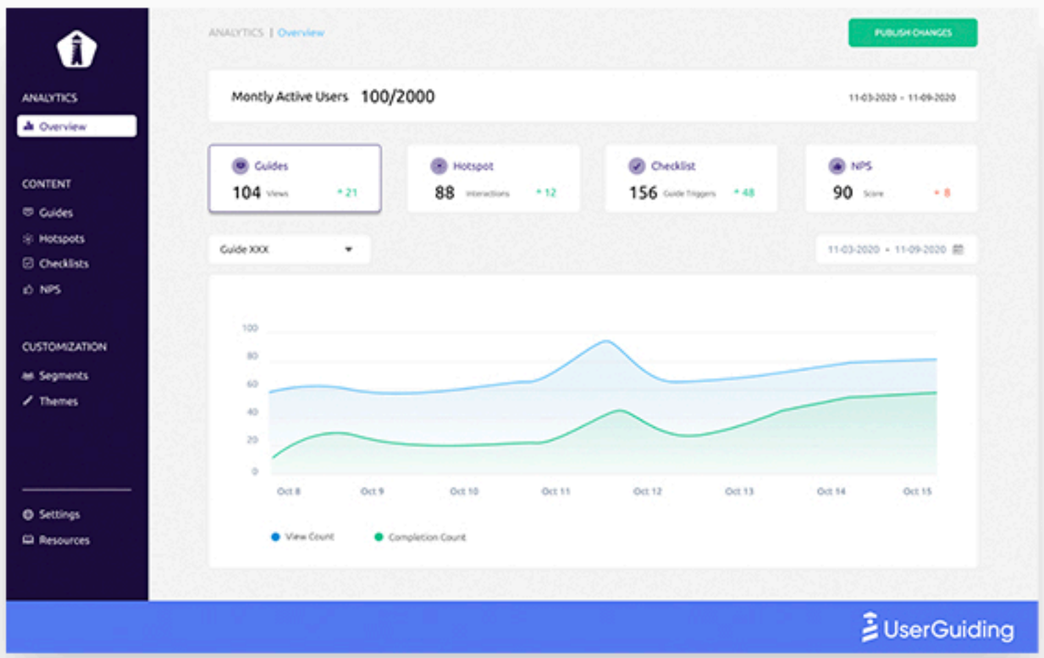
This way, you can make sure any question your user might ask gets answered right inside your own product, in the resource center.



#6 Analytics

If you can't measure something, you can't improve it.

An analytics tool helps you track and measure the success and the effectiveness of your products and services. UserGuiding has a powerful analytics tool to monitor your user onboarding performance.



#7 Net Promoter Score(NPS) surveys

Want to know how loyal your users are?
Curious to learn if your users recommend you to others?
Looking to make sure your clients are happy?

Net Promoter Score(NPS) surveys help you determine the answer to the questions above. With NPS surveys, you'll learn what your customers think—and a whole lot more.

UserGuiding offers comprehensive tools to run NPS surveys among your product users, and you can get started in minutes.