

SaaS Onboarding Survey Template

All questions are optional. Select one answer for each choice question.

Write your answers to the open questions in the space provided.

Think about your first two weeks with this software. Tell us about getting started, without passwords, account identifiers, or private workspace content.

1. What did you first want to accomplish with this software?

2. How far did you get with that first task?

- ☐ Did not try
- ☐ Started but could not finish
- ☐ Finished with help
- ☐ Finished without help
- ☐ Not sure

3. How easy was the initial setup?

- ☐ Very difficult
- ☐ Somewhat difficult
- ☐ Neither difficult nor easy
- ☐ Somewhat easy
- ☐ Very easy
- ☐ Did not attempt setup

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4. How clear was what to do after signing in?

- ☐ Very unclear
- ☐ Somewhat unclear
- ☐ Neither clear nor unclear
- ☐ Somewhat clear
- ☐ Very clear
- ☐ Did not sign in

5. How useful was the help you used?

- ☐ Not at all useful
- ☐ Slightly useful
- ☐ Moderately useful
- ☐ Very useful
- ☐ Extremely useful
- ☐ Did not use help

6. What was the biggest obstacle to getting started?

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7. What would have made your first two weeks easier?
