

# User Onboarding Interview Guide (Max 60 min)

These are example questions designed to guide an onboarding interview. They should be tailored to the product and participant context. Choose 1–2 warm-up questions and prioritize areas most relevant to your research goals. Aim for no more than 15 total questions to allow for natural conversation and follow-ups.

## Intro & Context

**Goal:** Understand the participant's role, responsibilities, and how they expect to interact with the product/service.

1. Can you tell me about your role and how it connects to [goal area]?
  2. What are you or your team trying to achieve with [this product/service]?
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## Pre-Onboarding Expectations

**Goal:** Surface mental models, prior experiences, and the triggers that led to adopting this solution.

3. What were you using before [this product/service], if anything?
  4. What led you to consider switching or adopting something new?
  5. Based on your past experiences, what did you expect [this tool/service] to do for you?
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## Initial Onboarding Experience

**Goal:** Explore the early learning curve, sense-making strategies, and any system-level friction or surprises.

6. Can you walk me through what your first few days or sessions looked like?

7. Were there moments that stood out as especially smooth or confusing?
8. How did you figure things out—on your own, with help, or something else?

*Probe for:* onboarding materials, peer help, assumptions tested

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### **Learning Curve & Mental Models**

**Goal:** Identify mismatches between user expectations and system logic, and reveal how users learn and adapt.

9. Were there points where you had to “unlearn” how things worked elsewhere?
  10. Were there actions or labels that didn’t behave how you expected?
  11. What parts felt intuitive vs. what required effort or trial-and-error?
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### **Current Usage & Behavior**

**Goal:** Understand how the product fits into daily or recurring workflows, what gets used, and what gets skipped.

12. What does your typical interaction with [the product/service] look like today?
  13. Which parts do you use most—and which ones do you avoid or ignore?
  14. Are there any hacks, shortcuts, or workarounds you've developed?
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### **Satisfaction, Friction & Gaps**

**Goal:** Elicit emotional reactions, unmet needs, and root causes of dissatisfaction or workaround behavior.

15. What’s working well and helping you do your job better?

16. What's slowed you down, felt clunky, or blocked progress?

17. Is there anything you're still unsure about, or just tolerate?

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### **Expectations vs. Reality**

**Goal:** Capture how initial expectations align or misalign with the current experience.

18. How has [this product/service] met—or not met—your expectations so far?

19. What do you wish had been different during your early experience?

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### **Close & Open Floor**

**Goal:** Offer space for unstructured insights, priorities, or ideas that didn't fit into earlier prompts.

20. If you had a magic wand, what would you fix or add today?

21. Is there anything we didn't ask that feels important about your experience?