SIGN-UP FLOW REVAMP

≡ substack

Substack is an online platform that allows anyone to start a newsletter, blog, website, or podcast for free. Substack used to lead the market, but now there's a lot of competition.

To help them continue to grow, I redesigned their sign-up flow with the goal of increasing the sign-up flow completion rate.

Create your publication

In just a few short steps, you'll have a publication equipped with everything you need to publish content, grow your audience, and track your analytics.

What would you like to name your publication?

Ex: World's Greatest Newsletter ✓

Don't worry, you can change this later.

Next - Create your URL

Step 1/6

To understand the situation, I started with two discovery-focused activities:

1. Content audit
2. Competitive analysis

The content audit helped me understand the weak points of the existing flow.

Click through the next few slides to see my audit of the sign-up flow.

Landing page (doesn't change)

Step 1

What type of email should be used? How will it be used?

Will subscribers be receiving newsletters from this email, or is it only seen by the user internally?

What is the outcome of creating an account?

What does the user get with an account? Will they be creating their newsletter right now?

Create your account

Your email address

Type your email...

By signing up, you agree to our publisher agreement, information collection notice, and privacy policy

Agree and continue

No indication of progress/ how long signing up will take

How can we make signing up approachable/not overwhelming?

Sign up now, and publishing is **free forever**. Once you start charging for subscriptions, we take 10% in addition to credit card transaction fees.

"Agree" isn't necessary in the CTA button since the text above it says, "By signing up, you agree to..."

"Free forever" is a good value prop.

Second sentence is a bit TMI. The user might not plan to charge for subscriptions, so adding this bit in might cause confusion or create friction.

Step 2

What comes with a profile? Can subscribers see the user's profile? How will it be used?

What name should they use? Their full name? The name of their newsletter?

What info should be in their bio? What makes a good bio? How long should it be/character count? Will users be able to change it later?

Consider adding an example bio in the box.

Set up your profile

Name (Required)

Type your name...

Bio

Say something about yourself...

Continue

No progress indicator

Make it clear that the previous step is for setting up a personal profile.

Should the header say "Create your publication URL" instead?

Create your publication

How will this URL be used? Are all of the user's blog posts/newsletters/podcasts housed here in an archive?

Is it a website their subscribers will have to visit often, or does it just house their personal profile?

Publication URL *

.substack.com ✓

Continue

Don't worry, you can change this later

Move "Don't worry" statement below the form field

No progress indicator

Step 3

Why is the header font different from the other screens?

No progress indicator

Import your mailing list

No worries if you don't have a list yet—Substack will help you build one.

Should there be a "Learn How" link after "Substack will help you build one"?

OR add the "how" to the description

Bring your list from Patreon, Ghost, Mailchimp, TinyLetter, and more.

Drag CSV file here or

Select CSV file

Why is this step necessary now? What's the benefit?

The extra work of exporting a spreadsheet as a CSV and uploading it here could create friction.

Skip for now

"Skip" option is good

Step 4

Add subscribers

Add friends and family to your subscriber list to help you get started

parent@yahoo.com

spouse@gmail.com

best.friend@aol.com

roommate@comcast.net

significant.other@protonmail.com

Continue

Don't worry, they won't get notified until you post

Skip for now

What's the purpose of this step? To add more people to their mailing list?

Why is this step necessary? Why should they do this now? What's the benefit?

"Skip" option is good

Why can't they upload their subscriber list as a CSV like they could with their mailing list?

Are these free subscribers or paid subscribers?

The CTA is unclear. By clicking it, is the user inviting people to subscribe? Or does entering their emails automatically subscribe them? Seems to be the latter based on the text below the button, but people could be unhappy if they were subscribed to a newsletter without their consent.

Can the user customize the notification that gets sent once they publish their first post?

No progress indicator

Step 5

Dive into your interests

We'll recommend great writing based on the topics you select

Culture   Politics   Technology   Business

Finance   Food & Drink   Podcasts   Sports

Faith & Spirituality   News   Music   Comics

Crypto   International   Art & Illustration

Writer favorites   Featured recommenders   +

Continue

Skip for now

What kinds of writing? Other newsletters? Blogs?

This doesn't feel like an essential question to be asked in user onboarding. Could easily be asked when the user starts exploring other publications

Why should they do this now? What's the benefit?

Why would they want to do this when setting up their own account? They likely aren't concerned with getting recommendations at this point.

"Skip" option is good

Where will the user see these recommendations? How many recommendations will they get?

CTA button: continue to what? Unclear

No progress indicator

Step 6

Writers you might enjoy

Based on your interests, here are some writers you might enjoy

No progress indicator

Again, it doesn't make a lot of sense to include subscription recommendations in the account creation process. It adds friction and makes the process take longer than it needs to.

"Skip" option is good

Unselect all

The official Ryan McBeth Substack
By Ryan McBeth

Get all of my power points, raw intelligence and limited/demonitized videos from YouTube here. https://www.youtube.com/...

UX Movement Newsletter
By Anthony

Become a master at designing the user experience

Lenny's Newsletter
By Lenny Rachitsky

A weekly advice column about building product, driving growth, and accelerating your career.

Zero to Hoodie Substack
By BowTiedCyber

A premium newsletter with EVERYTHING you need to go from ZERO to HOODIE and start your Cybersecurity Career.

SFGirlByBay
By SFGirlByBay

uniquely eclectic interior styling inspiration curated with an eye for vintage-modern design. show me your decor, and i...

Merry Marketeers
By Merry Marketeers

I plan to write a book report on a public company each week. I will discuss the models used and how I determined the in...

Substack Reads
By Substack

Your guide to great writing happening on Substack, plus the home of "The Active Voice," a podcast by Hamish McKenzie.

Subscribe to 7 and continue

Skip for now

Since you're recommending writers, switch "great writing" to "great writers" on the previous screen. Or switch the wording on both screens to "publications." "Writing" isn't specific enough.

Again., what does "continue" mean here? It would be more clear if you ended at "7". Unless there's another step...in which case, "continue" still isn' clear.

Step 7

Make it clear that they're about to see their dashboard and give examples of what they'll be able to do within it.

All set! Head on over to ████████.**substack.com** and tell the world about The's Substack.

Let's do this

Overall, there was no outcome mentioned or repeated. Even at the end, the user has no idea what lives over at the URL.

Needs clearer CTA. Ex: "See/Check Out/Go to dashboard."

"tell the world about The's Substack" makes it seem like the button leads to an auto-drafted social media post, when really, it leads to the user's dashboard.

Something like, "Head on over to [URL] to start exploring your dashboard. You'll be able to turn on paid subscriptions, get your first 10 subscribers, and write your first post."

Step 8

Dashboard (doesn't change)

Weak point #1: No progress indicators

The lack of progress indicators makes it impossible for users to see a finish line, which could lead to them losing motivation during the sign-up process and abandoning it altogether.

Weak point #2: No outcome mentioned

There was no outcome mentioned or repeated. Even at the end, the user has no idea what lives over at the URL. Why would they go through the process without knowing what's in it for them?

Create your account

Your email address

Type your email...

By signing up, you agree to our publisher agreement, information collection notice, and privacy policy

Agree and continue

Sign up now, and publishing is **free forever**. Once you start charging for subscriptions, we take 10% in addition to credit card transaction fees.

All set! Head on over to _____.**substack.com** and tell the world about The's Substack.

Let's do this

Weak point #3: Friction caused by optional steps

Progressive disclosure was used, but lots of potentially optional steps added unnecessary friction.

I also conducted a competitive analysis to understand market expectations.

To understand how Substack's sign-up flow compared to other newsletter platforms, I analyzed the sign-up flows of two competitors: beehiiv and Ghost.
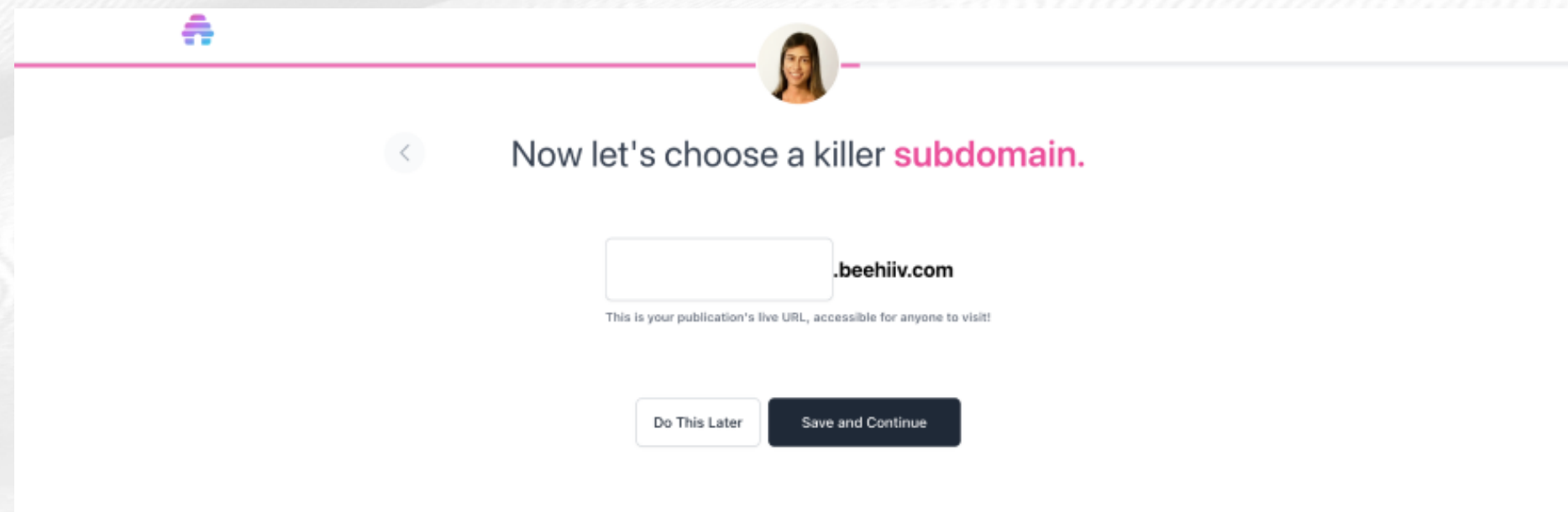
Competitor #1: beehiiv

Takeaways:
- beehiiv uses a progress bar to help users visualize their progress during the sign-up process.
- Like Substack, beehiiv prompts the user to create an account before delivering value.

Progress visualization

Account creation as Step 1

Competitor #2: Ghost

Takeaways:
- Ghost immediately delivers value to its users by getting them into the platform during Step 1.
- Like Substack, Ghost does not use progress indicators, and its CTA copy is very vague.
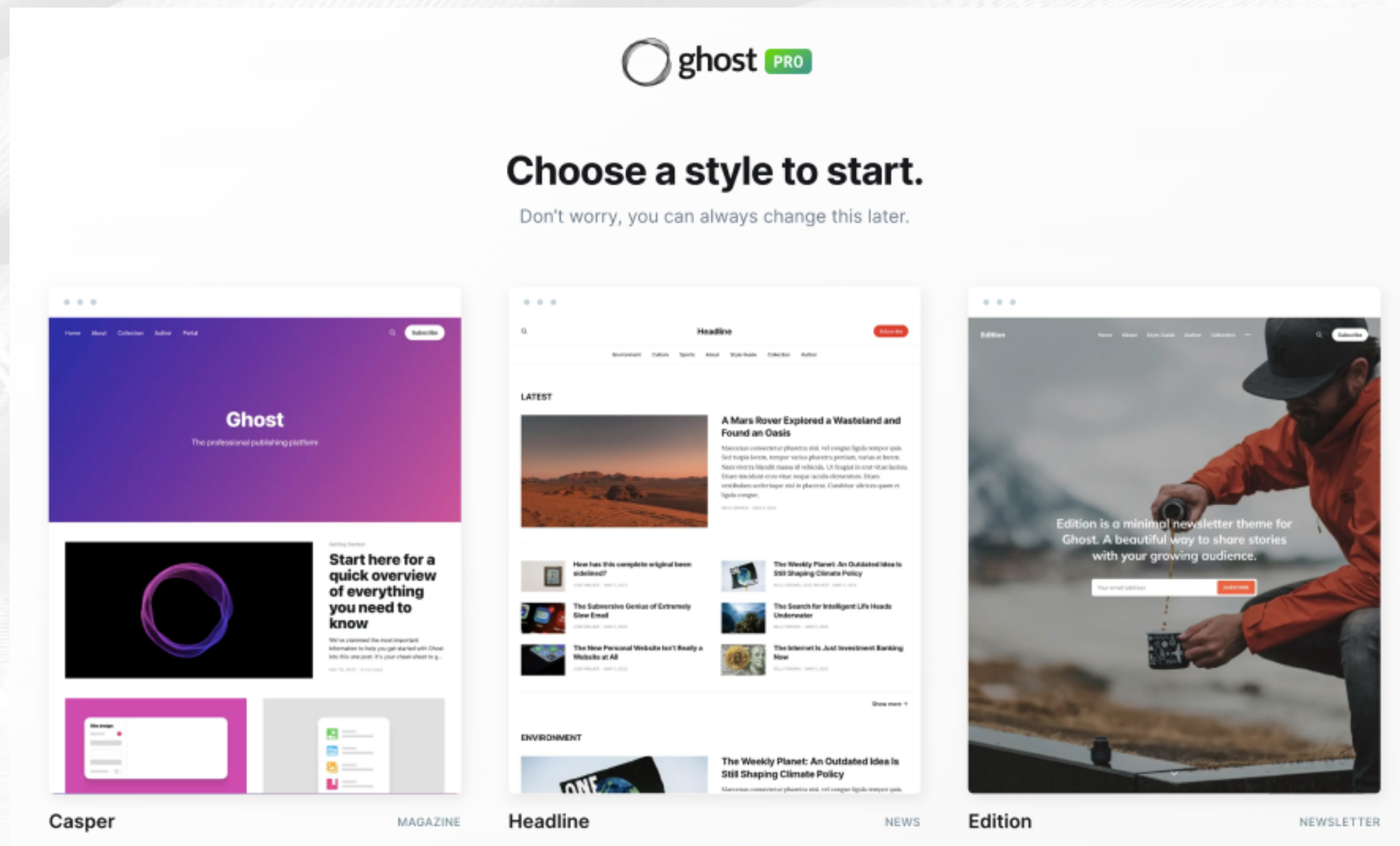
Value delivery during Step 1
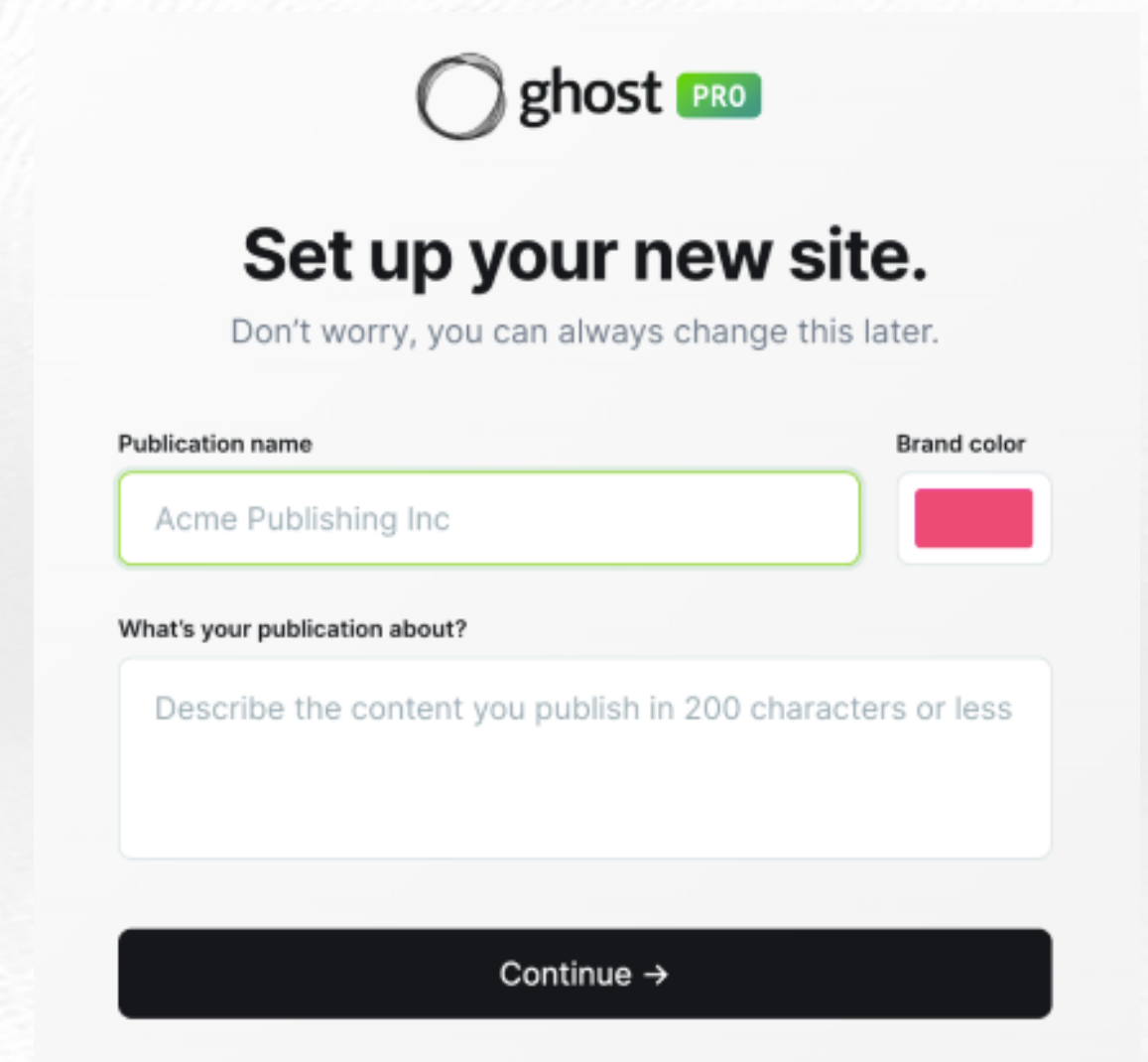
No progress visualization

Vague CTA

Based on the content audit and competitive analysis, I formed a hypothesis to lead my design process.

By focusing on the distinct value delivered and adding progress indicators, I'll increase Substack's sign-up flow completion rate, as users will be motivated by an outcome that's repeated throughout the process and have a clear path to completion.

Next steps

1. Land on a flow that tells the right story
2. Write microcopy

Flow iteration A

By centering sign-up around one hook/focus, I'll provide a clear outcome for the sign-up flow, incentivizing the user to continue and complete sign-up. I'll also streamline the process by eliminating unnecessary steps.

Landing page	Create publication	Create publication URL	Add categories	Set up profile	Create account (add em...	Add password	Dashboard
Landing page	**Create publication**	**Create publication URL**	**Add categories (skippable)**	**Set up profile**	**Create account (add email)**	**Add password**	**Dashboard**
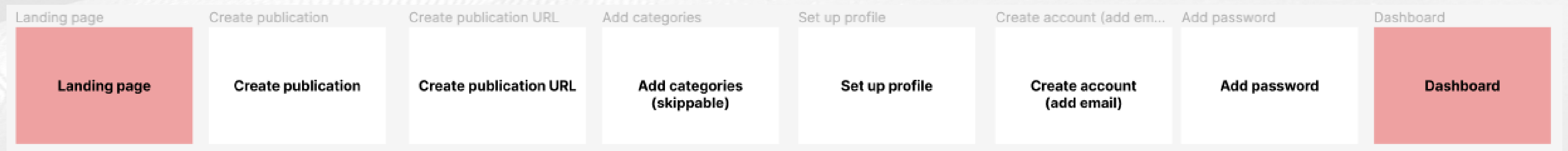
Flow iteration B

By getting the user into the product ASAP and eliminating unnecessary steps, I'll lower the cognitive load and incentivize setup at their preferred pace.

Landing page | Create account (add em... | Add password | Create publication | Create publication URL | Add categories | Set up profile | Dashboard

Landing page | **Create account (add email)** | **Add password** | **Create publication** | **Create publication URL** | **Add categories (skippable)** | **Set up profile** | **Dashboard**
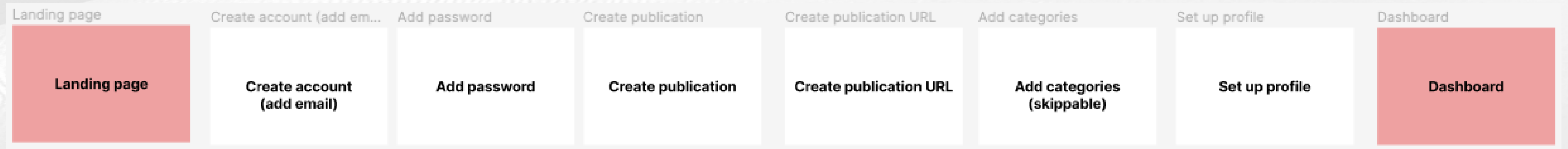
I decided to move forward with iteration A.

After reviewing my audit of the original flow, I decided iteration A better supports my hypothesis. By immediately getting users into the platform, they will have a clear understanding of the value being delivered and be motivated to complete the sign-up process.

Final design

Create your publication

In just a few short steps, you'll have a publication equipped with everything you need to publish content, grow your audience, and track your analytics.

Outcome clearly stated

What would you like to name your publication?

Ex: World's Greatest Newsletter ✓

"Don't worry" statements answer potential user questions

Don't worry, you can change this later.

Next - Create your URL

Progress indicators in CTA buttons and bottom left corners

Step 1/6

Step 1

Create your publication URL

Your URL is where readers can find your previous posts, view your personal profile, and listen to your podcast episodes.

Subheader clarifies what the URL is used for

Create a URL for your publication. We recommend using the name you gave your publication.

worldsgreatestnewsletter .substack.com ✓

Recommendation helps users know what to put in the form field

Don't worry, you can change this later.

Next - Add categories

Step 2/6

Step 2

Final design

Outcome (a publication) repeated in the subheader

Changed this step from users selecting their interests and getting recommendations to focus it more on their publication setup

Add categories

Categorizing your publication with keywords helps others discover you from search.
Select up to 2 categories that describe your publication.

Subheader clarifies purpose of this step

Culture	Politics	Technology	Business
Finance	Food & Drink	Podcasts	Sports
Faith & Spirituality	News	Music	Comics
Crypto	International	Art & Illustration	+

Don't worry, you can change these later.

Next - Set up your personal profile

Step 3/6

Skip for now

Step 3

Set up your personal profile

Readers can visit your profile to see a list of your recent posts, find links to your social media profiles, and read short-form content you've published via Substack Notes.

Explained the purpose of the user's personal profile

In addition to your profile, the name and photo you use will appear in the byline of your posts.

Added a tooltip to give users more context as to how their name and photo will be used

Name (Required) ⑦

Type your name...

"Tell readers about yourself" informs users that readers will be able to see their bios

Bio

Tell readers about yourself...

Ex: Award-winning journalist interested in the history of pop culture and its impact on society

0/250

Bio example gives users a possible framework for writing their own bios

Don't worry, you can change these later.

Character count acts as another guide for users when writing their bios

Next - Create an account

Step 4/6

Step 4

Final design

First sentence is meant to excite the user about the outcome and encourage them to finish signing up

Create your account

Your new publication is almost ready! Add your email to create your account and officially join the Substack community.

Clarified what creating an account does

Your email address

Type your email...

You'll use this email to log in to your account, and your subscribers won't be able to see it.

Explained to the user how they will use the email they enter

Aimed to make users feel safer using a personal email by explaining that readers won't see it

Next - Add password

Step 5/6

Step 5

Subheader tells users where the CTA will take them and what they should do when they get there

Add password

Lastly, add a password to secure your account. Then head over to your Substack dashboard to take a look at your new publication.

Your password must include 8 characters minimum.

Added password requirement in a tooltip

Password (?)

Type your password...

By signing up, you agree to our publisher agreement, information collection notice, and privacy policy.

CTA reminds users of the outcome and aims to excite them

See your publication

Step 6/6

Kept "free forever" value prop

Sign up now, and publishing is **free forever**.

Step 6

Next steps

Collaborate & Create
- Before implementing this task, I'd first meet with engineering, product management, and product design teams to identify any constraints.

- I would then collaborate with a product designer in a Figma file, making sure to clearly define where each of us was working and when.

Test & Refine
- Once the first iteration of the sign-up flow had been completed, I would conduct beta tests with users to gain feedback and uncover any problems.

- I would then create a new iteration of the sign-up flow based on the feedback I received.

- Then, I would run A/B tests so users could compare the two versions, which would help me determine which one drove better results.

Finalize & Ship
- Using the data from both the beta and A/B tests, I would create a final sign-up flow, making sure to document it before putting it into effect.

- After the final solution had shipped, I would take note of the outcome. If the completion rate had decreased, I would refine the sign-up flow by repeating the steps listed above.