



Growth Lead Onsite Case Study

Task

Choose one of the 3 experiments you proposed in Part 2 for your take home submission and create a concise product brief for the Engineering team.

Output

Your brief should provide enough clarity and details that the engineering team can implement the feature with minimal ambiguity and should explain:

- Problem & opportunity
 - Hypothesis
 - Experiment Design
 - Success Metrics
 - Product / User Experience Changes
 - Events to capture in Posthog
-

PRD: Guided Onboarding in Juicebox's FTUE

Opportunity

When new users come into Juicebox with hiring intent, the first-time experience asks them to explore the product before they complete the core job they're expecting to hire Juicebox for. New users encounter secondary surfaces (dashboards, filters), setup tasks, less relevant paywalls, and upgrade hooks before they've completed the core sequence of actions that proves Juicebox's primary value.

Juicebox's first time product experience should guide users through the highest-value early workflow end to end: one recruiting task tied to an activation metric with as much focus as possible and defer highlighting other features to a future time period after a user experiences the primary product value.

It should be built to focus on a primary buyer persona. Once the flow meets that persona's needs, we can further branch/personalize to other user segments:



- Primary persona: recruiter or sourcer with an active role to fill
- Secondary persona: founder or hiring manager sourcing for a specific role, if their first-session behavior matches a recruiter-like workflow

Hypothesis

Creating a focused, opinionated onboarding path that moves a new user through the highest-value early workflow will build a user's confidence in Juicebox's capabilities and increase the number of users who understand the value of Juicebox enough to monetize.

Experiment Design

Setup	
Flag name	exp_magnet_onboarding
Variants	Control, V1
Target population	New user signups (all sources) in their first session
Design of Experiment	
Experiment length	X days for 10% minimum detectable effect
Experiment ramp plan	Launch date: 6/2/2026 • Smoke test 6/2 • 10%: 6/3 • 50%: 6/4 Target end date: 6/20/2026

Control

- Existing onboarding path

V1

- Build a guided path that moves users from running a search into the next most valuable action.
 - Suggested list: Run a search, view profiles, shortlist candidates, and reach a value-anchored paid action like contact reveal or export.



- Deprioritize items that interrupt this first loop (ex: viewing Talent Insights, invite other users, etc)
- Make onboarding tasks more visually prominent and deliver a sense of forward momentum (delight when action is completed).

Success Metrics

Primary success metric

- Activation rate
 - % of new users who complete activation criteria within 7 days
 - Measure whether users experience and understand the core product value
 - Ex. activation metric: run a search, save or shortlist at least 3 candidates, and reveal contact info or export in Y days.

Secondary metrics

- Time to first monetization action
 - Median days from account creation to contact reveal or export attempt
 - Anchor to the strongest conversion-intent aligned paywall. Contact/Export is an assumption
 - Measure whether users are reaching a moment of paid value faster
- Paid conversion rate
 - % of users who convert to a paid plan within 14 days
 - Measure if activation drives purchase intent

Guardrails

- 30d usage retention rate
 - % users active on day 30 after their initial signup
 - Ensure that new onboarding isn't pushing users through an experience that doesn't increase durable usage
 - If activation increases but users churn, we may not be targeting the right actions to show value

Product / User Experience Changes

Prototype: [LINK](#)

Note: Prototype is meant to convey intent, not precise layout/component placement. Will partner with product design for UX/visual design, animations, and progress/delight states.



Screen 1: Simplify onboarding survey

This is the first screen of the onboarding survey modal. It has a dark purple background on the left with a white Juicebox character and the text "A Juicebox for every role. Let's get sourcing." On the right, a white card contains the text "You're 60 seconds away from a candidate shortlist" and a small cube icon. Below this, it asks "What's your role?" and lists five options: "In-house recruiter" (selected with a radio button), "Agency recruiter", "Hiring manager", "Founder", and "Other". A purple "Continue" button is at the bottom.

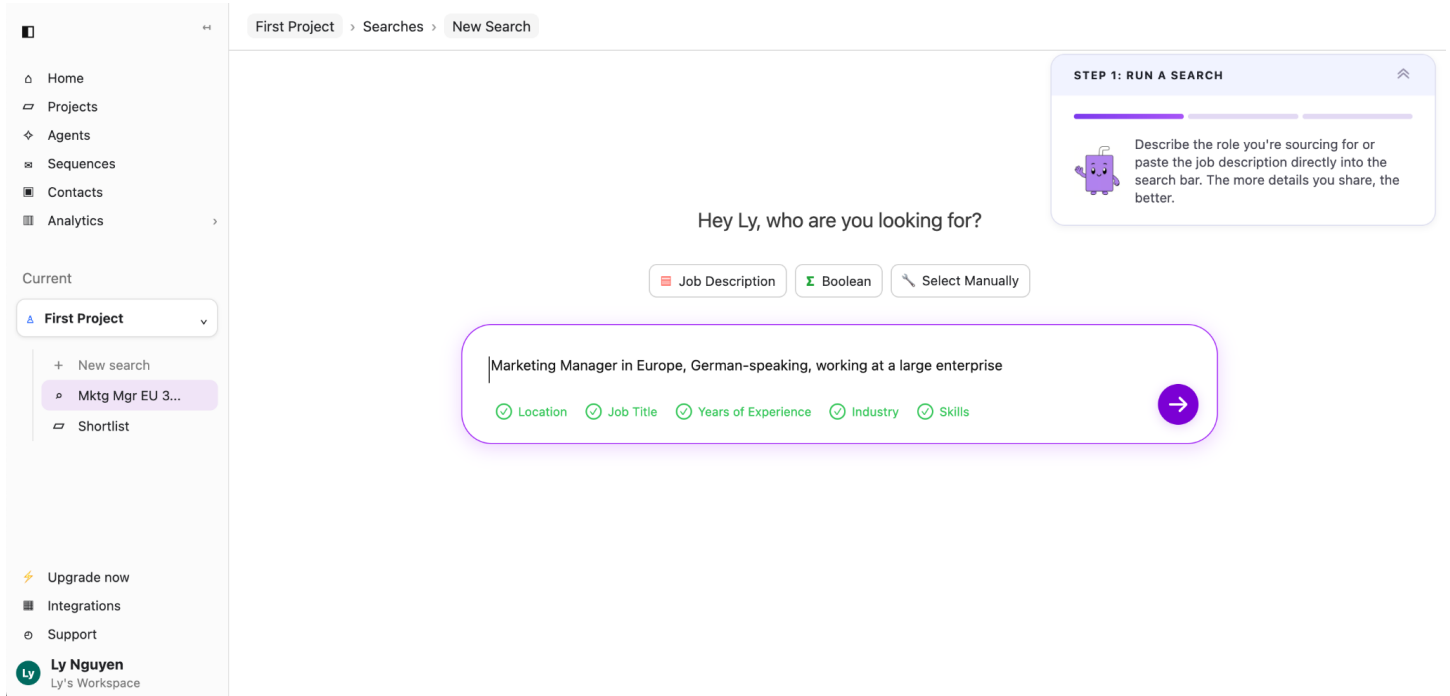
This is the second screen of the onboarding survey modal. It has the same dark purple background and Juicebox character on the left. The white card on the right has a "< Back" link at the top left and the title "Three easy steps to get started". It lists three steps: 1. "Run a search" (Tell us what you're looking for and we'll source the best matches for your open role.), 2. "Save the best candidates" (Review profiles and build a list of who you'd like to reach out to or share with a hiring manager.), and 3. "Begin your outreach" (Access verified contact info, then export candidates or use our personalized Sequences to start engaging your top matches.). A purple "Start your first search" button is at the bottom.

UI Key Functionality

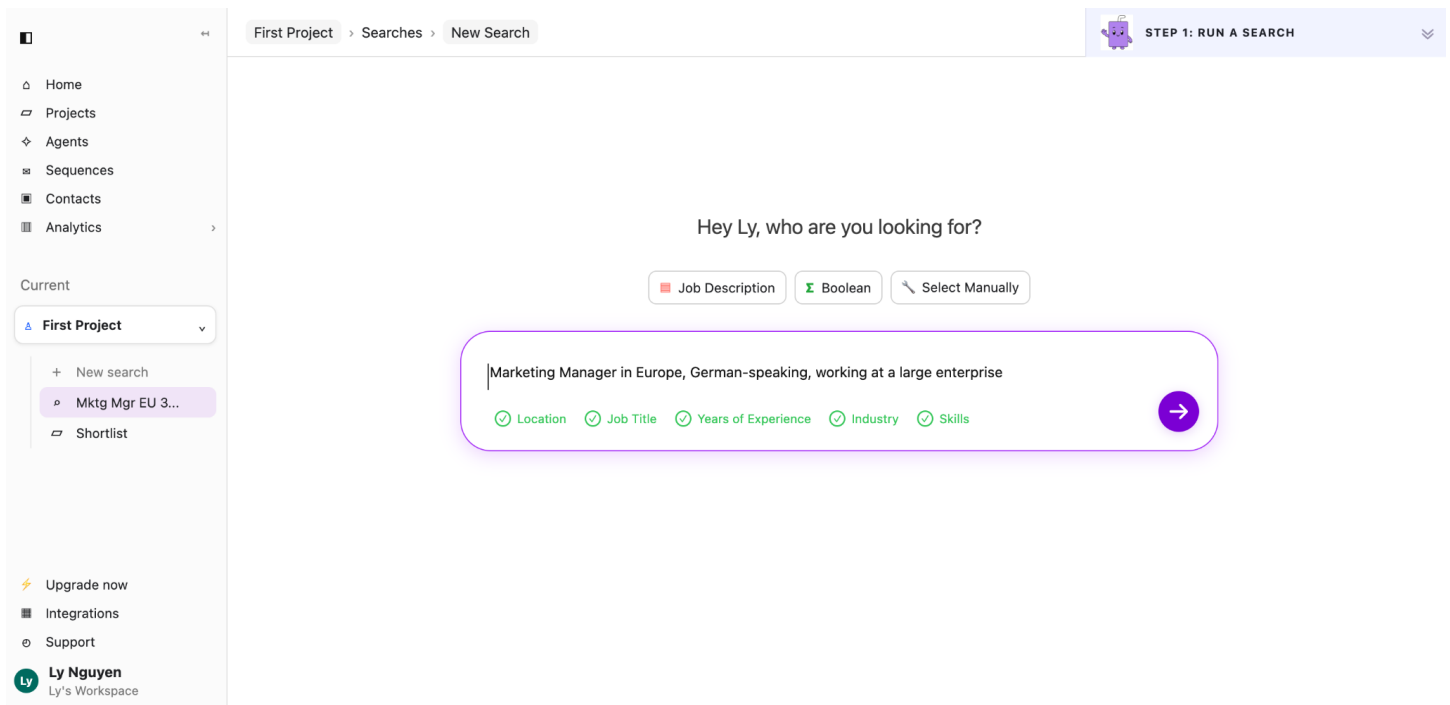
- Onboarding survey modal appears over blurred in-product view so user has the sense of being in product immediately after signup
 - Suppress onboarding survey asks around referral source, team invites
 - Research needed: consider adding referral step back in if data shows large disparity between reported and auto-recorded referral sources.
- Continue button disabled until a role selection is made. Only required field



Screen 2: Land user on search flow



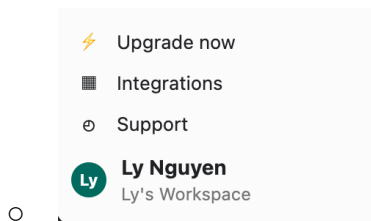
Onboarding component minimized





UI Key Functionality

- Land the user directly in the search flow
- Pre-fill the user's stated role/search intent from marketing-site search bar
 - If not captured, include help text + preserve existing prompt guidance to teach users how to avoid underspecified searches.
 - Grey help text in search composer: "Describe the role you are trying to source. Ex: Marketing manager in Europe, German speaking, working at a large enterprise company."
- Remove "Find Similar" button from above search bar
- Remove "Network" menu item from bottom of left rail
- Remove trial/upgrade banner at bottom of screen and replace with persistent ⚡ "Upgrade now" menu line item



Onboarding Component Functionality

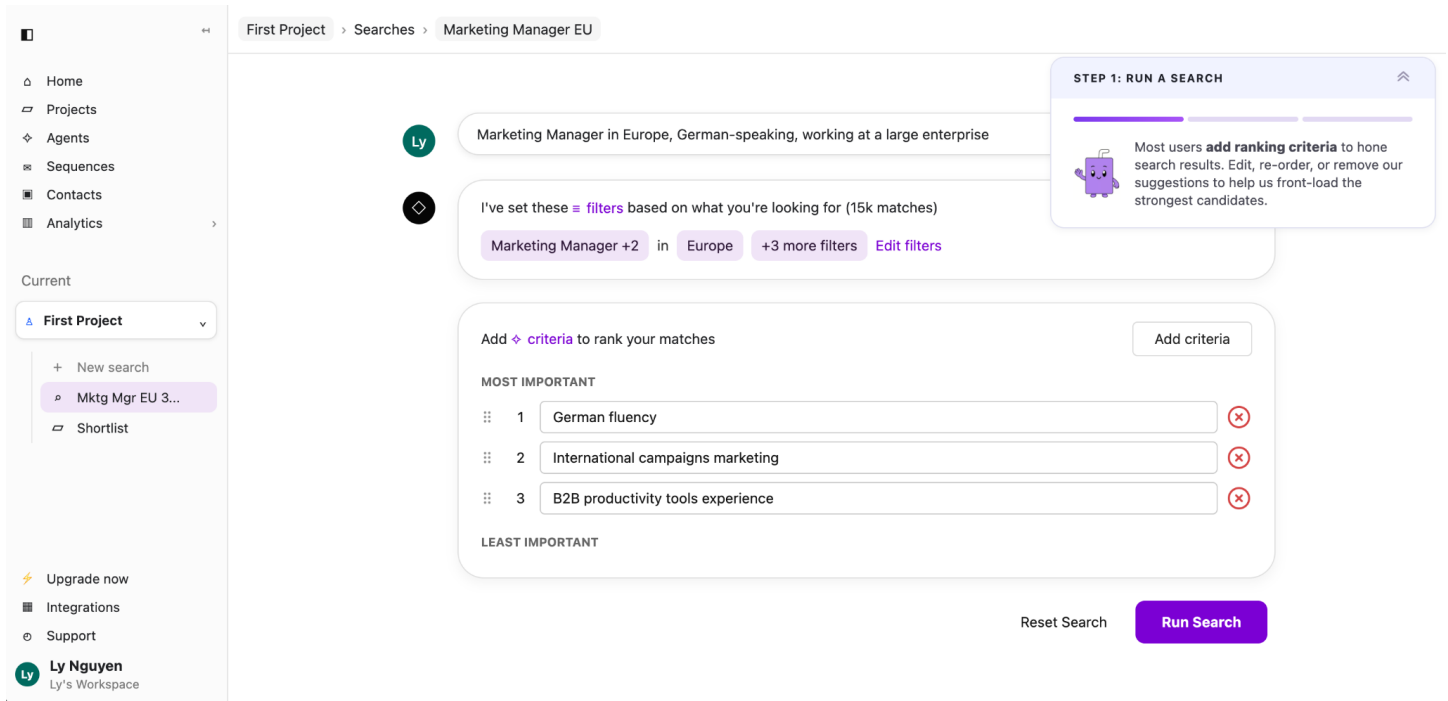
- Onboarding component is **persistent** and stays anchored to the top right of the UI.
 - Will remain in UI for 7 days
 - User can minimize the component but not dismiss it before 7 days elapses
 - When minimized, component stays anchored to the top navigation with header text instruction visible
- Component state is driven by the activation sub-step the user is on. Progress bar segments = Search / Candidates / Shortlist.
 - Implement per-step animations to indicate success at each key step + add user delight
- For Step 1: Run a Search
 - Starts with one progress bar segment filled



- Onboarding component copy: Describe the role you're sourcing for or paste the job description directly into the search bar. The more details you share, the better.
- Animate Juicebox to celebrate on successful search arrow click



Screen 3: Confirm filters and nudge ranking criteria before user runs search



UI Key Functionality

- Adding ranking criteria has outsized impact on candidate quality (from onsite convos), so criteria UI is embedded prominently in the search flow
 - Before results load, generate suggested criteria that user can edit/drag-to-re-order/dismiss in place
 - Confirm criteria events fire when the user adds, edits, removes, or reorders so we can measure interaction
- Users can Run Search without making any changes

Onboarding Component Functionality

- Onboarding step is tied to running a search so between this step and the last, onboarding prompt remains at Step 1
 - Update onboarding component copy: Most users **add ranking criteria** to hone search results. Edit, re-order, or remove our suggestions to help us front-load the strongest candidates.
- Animate Juicebox to celebrate on successful "Run search" button click



Screen 4: Drive interaction with Profile search results

Home

Projects

Agents

Sequences

Contacts

Analytics

Current

First Project

+ New search

Mktg Mgr EU 3...

Shortlist

First Project > Searches > Marketing Manager EU

Share

STEP 2: CHOOSE CANDIDATES

Check out all these candidates! Review and save the best-fit profiles for your role to a shortlist so you can contact, export, or track them during outreach.

Filters 5

Results Insights

Matches (11k)

Clara Gribaudi

Communications and Product Marketing Manager at Novartis · Basel, Basel-Stadt, Switzerland

Masters, Communications at Università Degli Studi DI Torino

German Languages include German, indicating German speaking ability.

Campaigns Experience leading integrated international campaigns across EMEA, North America, and APAC.

B2b productivity Over 7 years of marketing enterprise task tracker and coordinating across functions.

Veronika Mihálová

Global Digital Marketing Compliance Project Manager at The Adecco Group · Prague, Prague, Czechia

MGR. at Univerzita SV. Cyrila a Metoda, Trnava

German Languages list includes German, indicating German speaking ability.

Campaigns Has run regional demand generation programs across multiple countries and buyer segments.

B2b productivity Experience with work management tools like Asana, where teams track projects, manage priorities.

Danielle van der Steen

Onboarding component minimized

Home

Projects

Agents

Sequences

Contacts

Analytics

Current

First Project

+ New search

Mktg Mgr EU 3...

Shortlist

First Project > Searches > Marketing Manager EU

Share

STEP 2: CHOOSE CANDIDATES

Filters 5

Criteria 1

Results Insights

Matches (11k)

Agent 1 - 15 of 11k

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Communications and Product Marketing Manager at Novartis · Basel, Basel-Stadt, Switzerland

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Profile detail panel expanded

The screenshot shows the Juicebox interface with a search results page. The left sidebar contains navigation links: Home, Projects, Agents, Sequences, Contacts, and Analytics. The main content area displays search results for "Marketing Manager in Europe, German-speaking enterprise". A floating toolbar is visible above the results, showing a "New search" button, a search bar with "Mktg Mgr EU 3...", and a "Shortlist" button with a badge showing "3". The profile detail panel for Clara Gribaudo is expanded, showing her contact information, experience at Novartis and Università Degli Studi Di Torino, and a "Shortlist" button. The panel also includes tabs for Overview, Experience, Education, and Skills.

Search results floating toolbar shown after profiles checked

The two screenshots compare the search results floating toolbar in two different states. The left screenshot, labeled "Without Profile detail panel", shows the toolbar with a "Shortlist" button and a badge showing "3". The right screenshot, labeled "With Profile detail panel", shows the toolbar with a "Shortlist" button and a badge showing "3", but the profile detail panel for Clara Gribaudo is expanded, showing her contact information, experience, and a "Shortlist" button. The floating toolbar is also visible in the right screenshot, showing the "Shortlist" button and the badge "3".

UI Key Functionality

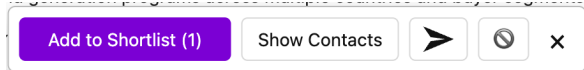
- Remove "+ New Search" button on top nav to maintain user focus
- Each candidate user Shortlists increments the number in the badge by the Shortlist menu item

This close-up shows the search results floating toolbar. It includes a "New search" button, a search bar with the text "Mktg Mgr EU 3...", and a "Shortlist" button with a badge showing the number "3".



- Clicking a profile opens the full profile panel from the right
 - "Add to sequence" button is removed from top and floating toolbar to maintain user focus
 - Note: this prototype doesn't implement every profile detail view and Profile detail Shortlist buttons are non-functional

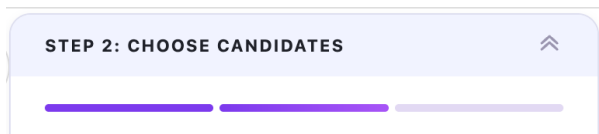
- When 1+ candidates are checked on search results view, floating toolbar appears
 - Actions: Add to Shortlist, Show Contacts, Add to Sequences (icon), Hide (icon)



- Remove "Find Similar" to maintain user focus
- Research needed: analyze Tag usage before decision is made to remove

Onboarding Component Functionality

- Onboarding component progresses to second bar



- Update onboarding component copy: Check out all these candidates! Review and save the best-fit profiles for your role to a shortlist so you can contact, export, or track them during outreach.
- Minimizing onboarding component shifts "Share" button to the left
- Animate Juicebox to celebrate on third successful "Shortlist" click across search results
 - Update onboarding component copy: You've got a good list going! Keep reviewing profiles or check out your shortlist to reveal contact info, export candidates, or reach out via personalized Sequences.



Screen 5: Use Shortlist page to explore outreach functionality (contacts, tracking, Sequences)

Home

Projects

Agents

Sequences

Contacts

Analytics

Current

First Project

New search

Mktg Mgr EU 3...

Shortlist

Upgrade now

Integrations

Support

Ly Nguyen

Ly's Workspace

First Project > Shortlist (3)

ExportRequest Review

Search by name, company, etc.

Sort by Date

Add Filter

	Full Name	Profiles	Status	Owner	Date
☐	Danielle van der Steen		Not Contacted	Ly	3 hours ago
☐	Clara Gribaudo		Not Contacted	Ly	3 hours ago
☐	Veronika Mihálová		Not Contacted	Ly	3 hours ago

STEP 3: START OUTREACH

Great work. Reveal contact info to reach out or create a personalized Sequence in Juicebox. Your trial comes with **10 free credits** to keep your hiring process moving.

Global Digital Marketing Compl...The Adecco Group

Shortlist floating toolbar shown after profiles checked

Home

Projects

Agents

Sequences

Contacts

Analytics

Current

First Project

New search

Mktg Mgr EU 3...

Shortlist

Upgrade now

Integrations

Support

Ly Nguyen

Ly's Workspace

First Project > Shortlist (3)

ExportRequest Review

Search by name, company, etc.

Sort by Date

Add Filter

☒	Full Name	Profiles	Status	Owner	Date
☒	Danielle van der Steen		Not Contacted	Ly	3 hours ago
☒	Clara Gribaudo		Not Contacted	Ly	3 hours ago
☒	Veronika Mihálová		Not Contacted	Ly	3 hours ago

STEP 3: START OUTREACH

Great work. Reveal contact info to reach out or create a personalized Sequence in Juicebox. Your trial comes with **10 free credits** to keep your hiring process moving.

Global Digital Marketing Compl...The Adecco Group

Show contacts

Add to Sequence

X

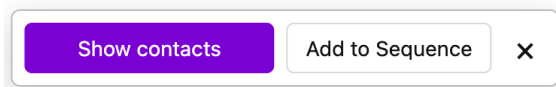


Onboarding success state (Contact credits 1/3 depleted)

☐	Full Name	Profiles	Status	Owner	Date
☐	Danielle van der Steen	in m p	Not Contacted	Ly Ly	3 hours ago
☐	Clara Gribaudi	in m p x	Not Contacted	Ly Ly	3 hours ago
☐	Veronika Mihálová	in m p	Not Contacted	Ly Ly	3 hours ago

UI Key Functionality

- Removed menu buttons: Import, Smart Reports (paywalled features)
 - Research needed: analyze Kanban Table usage before decision is made to remove
 - Research needed: analyze Shortlist search usage before decision is made to remove
- Promote bulk actions: When 1+ candidates are checked, a floating toolbar appears. Same design as on search results page
 - Actions: Show Contacts, Add to Sequence



- Show Contacts bulk reveals candidate contact info. Warn users to select X candidates if they don't have enough credits to fully reveal.

Onboarding Component Functionality

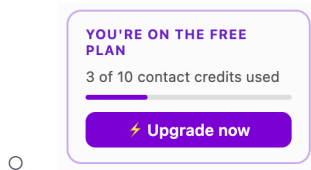
- Onboarding component progresses to third bar



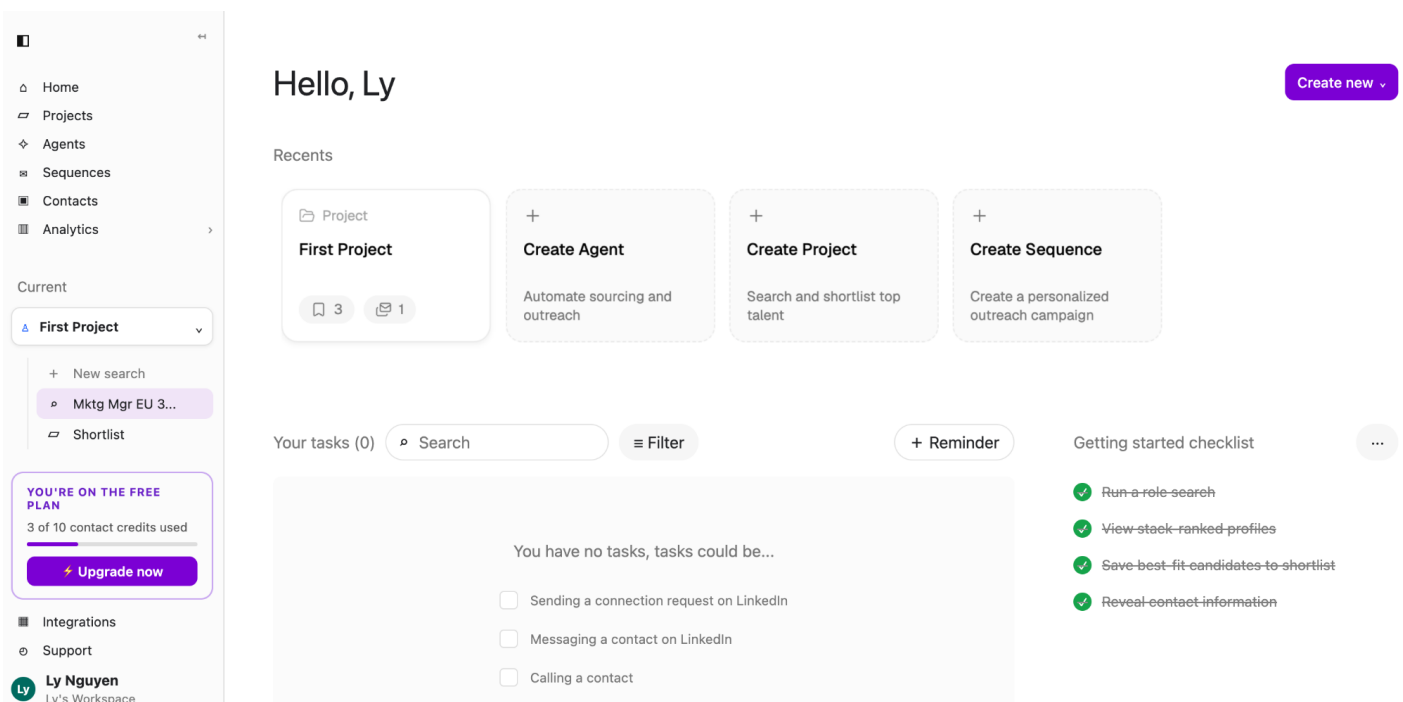
- Update onboarding component copy: Great work. Reveal contact info to reach out or create a personalized Sequence in Juicebox. Your trial comes with **10 free credits** to keep your hiring process moving.



- Research needed: 10 credits is my placeholder but /pricing says there are zero contact credits provided but that's not what's implemented in trial. Communicating a hard number will create a sense of urgency.
- Minimizing onboarding component shifts "Export" and "Request Review" buttons to the left
- Animate Juicebox to celebrate when $\frac{1}{3}$ of Contact credits are depleted.
 - Update onboarding component copy: Nice job! Don't stop here—start a search for your other roles, create a personalized outreach Sequence, or make an agent and put Juicebox to work for you.
 - Turn progress bar flat gold color with delight effect
 - Add "Go to Dashboard" button
 - Provide X to dismiss onboarding module from UI
 - Note: this prototype doesn't listen for or track Contact credit usage. In production, there are many paths to use up Contact credits and this onboarding step will trigger completion when those credits are $\frac{1}{3}$ depleted.
- Replace "Upgrade now" menu link with Upgrade card on the left rail tracking Contact credit payroll



Screen 6: Home Dashboard post-onboarding





UI Key Functionality

- Reorder default creation functionality: Create Project, Create Sequence, Create Agent
- Upgrade card remains on the right rail until plan is upgraded to paid

Onboarding Functionality

- Home dashboard will have Getting Started checklist that tracks same events as onboarding tooltips
 - When action is taken, green checkmark fills + text is crossed out



- After 7 day period when the top right onboarding component disappears, Getting Started checklist will persist + shows incomplete actions
 - 2 work days after Getting started/onboarding list is completed OR 14 days after account creation, Getting Started checklist disappears

Prioritization

Must-have

- Persist first hiring intent through signup and onboarding
- Search focused first-session path
- Preload marketing-site demo search after signup
- Persistent onboarding checklist tied to activation criteria only
- Contextual upgrade modal for reveal/export moments
- Experiment flag and event logging

Nice-to-have

- Getting started checklist on Home/Dashboard
- Personalized checklist copy based on persona or role type
- Celebration/progress UI after each completed step
- Adaptive guidance based on search quality or candidate result quality
- Lifecycle email triggered if user runs search but doesn't shortlist

Out of Scope

- Full onboarding redesign for every persona
- Analytics/Talent Insights education
- Team invitation moments



Risks

- Users feels over-guided or constrained by onboarding suggestions
 - Mitigation: Let users dismiss the guided path and access the full product, but keep one suggested next action visible.
- Activation definition may be incorrect
 - Mitigation: Validate activation criteria against paid conversion, not just completion
- Search quality may be poor, causing the onboarding flow to accelerate users toward disappointment.
 - Mitigation: Track profile engagement after first search and introduce search refinement guidance when results underperform.

Events to capture in Posthog

Required tracking

- Signup source + timestamp
- Contact credit usage
- User runs search
- User views candidate profile
- User shortlists candidate
- User completes activation sequence
- User attempts contact reveal
- User attempts candidate export
- Paid conversion
- User is active after 30 days (retention)