

59

/ 100 · C+

4 screens · app.asana.com/0/account_setup · desktop web · scanned July 6, 2026

Asana — Account Setup Flow

A low-friction, well-paced flow with strong ownership mechanics — undermined by **zero smart defaults** on its two choice screens and a **teammate-invite ask before any value** is delivered.

Smart Defaults		4/10
Reciprocity / Value Before Ask		5/10
Loss Aversion Framing		6/10
Anchoring / Contrast		6/10
Goal Gradient / Progress		7/10
Ownership / Endowment		8/10

Biggest leak

Zero defaults on the two choice screens — every blank field is completion left on the table.

Biggest win

Pre-select "Personal to-dos" and enable Continue on load — ships in an afternoon.

Fastest fix

Add "Skip for now" to the invite screen — one line of copy.

Reading the score: 59 against the rubric's 100-point ceiling. Percentile benchmarks appear in reports once our scored-flow dataset passes 50 products — we don't publish invented baselines. The gap to a strong flow is closable mostly with copy and default-state changes, not redesign: four of the seven fixes in the roadmap ship within a week.

Scoring: each principle rated 0–10 against behavioral-science anchors; every finding cites visible on-screen evidence. Loss Aversion and Anchoring have limited surface in a setup flow (no pricing or commitment screens present) and are scored on the signals available.

Your top 3 issues

01

HIGH

Smart Defaults

Screens 2 & 3

Two choice screens, zero defaults

Impact ★★★★★ Confidence ★★★★★ Effort ★☆☆☆☆

Every blank field is a decision, and every decision is a place to stall or leave. Screen 2 presents three use-case cards with none pre-selected; Screen 3 presents three templates with none pre-selected — and the “Continue” button **disabled** until the user chooses. Most users accept a default when offered (NN/g, “The Power of Defaults”), so each of these blanks is completion you’re leaving on the table.

Evidence: Screen 3 — “Continue” is grayed out; cards “Personal to-dos / Travel planner / Home improvement tracker” all unselected.

Direction Pre-select the statistically most common option on both screens and keep Continue enabled on load.

02

HIGH

Reciprocity

Screen 4

The teammate invite arrives before any value

Impact ★★★★★☆ Confidence ★★★★★☆ Effort ★★☆☆☆

Asking for three teammate emails before the user has seen a single task spends their social capital on a product they haven’t experienced. Invites sent this early convert poorly — and the ask itself gives hesitant users a reason to bail one screen before the finish line.

Evidence: Screen 4 — “Invite a teammate to try Asana together” with 3 empty email fields; no “Skip for now” link.

Direction Move the invite to after the first aha moment, or reduce it to one field with an explicit skip.

03

MEDIUM

Goal Gradient

Screens 1–4

The progress bar does real work but never announces itself

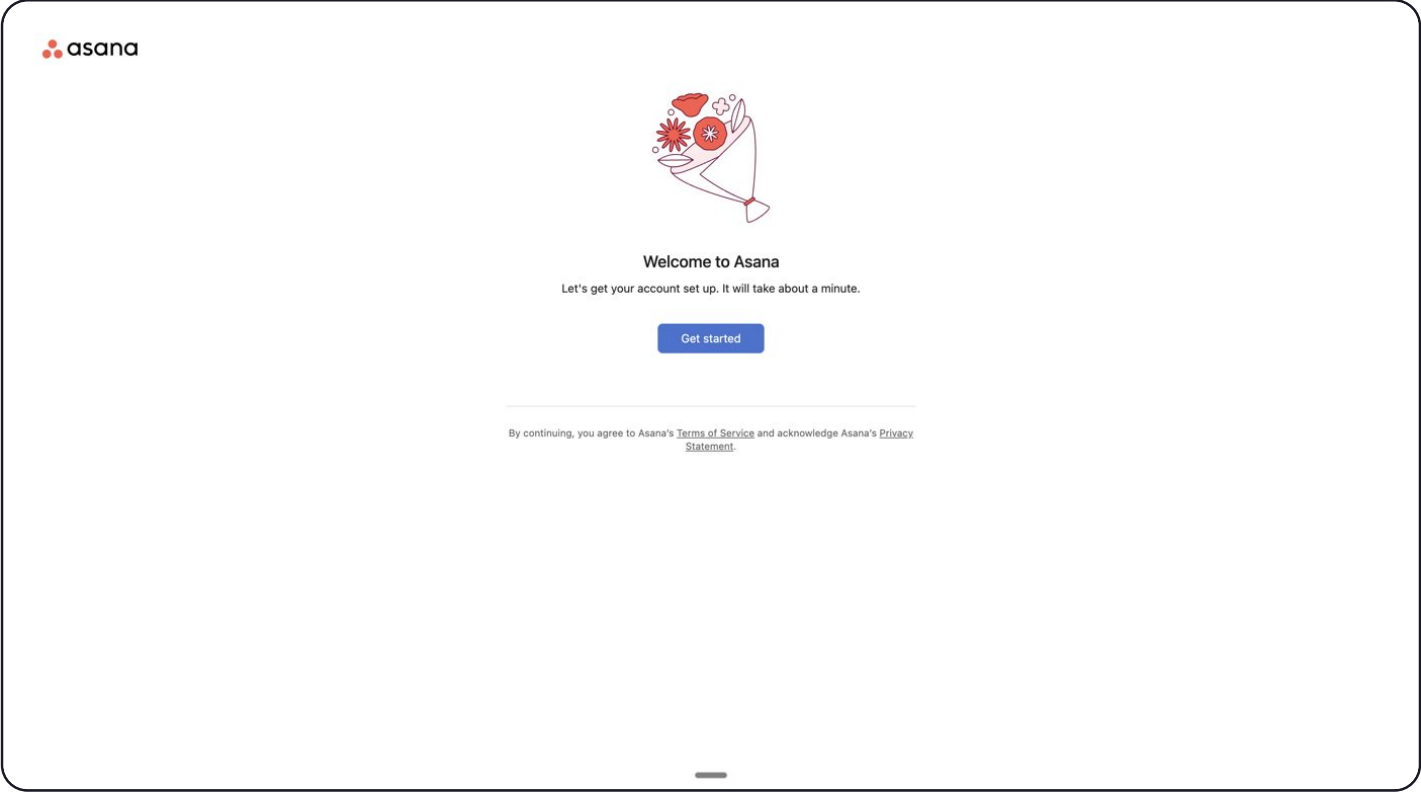
Impact ★★★☆☆ Confidence ★★★★★☆ Effort ★☆☆☆☆

This bar is quietly reducing abandonment: it starts pre-filled at ~20%, so users feel they’ve already begun — in the original study, completion rose from 19% to 34%. But it’s unlabeled (no step count, no percentage), so most users never consciously register it and the motivation goes unused. Screen 1 also spends an entire screen on a single “Get started” click.

Evidence: Screens 2-4 — unlabeled progress bar at top; Screen 1 — sole action is "Get started".

Direction Label the bar ("Step 2 of 4") and merge the welcome screen into the first question.

Screen 1 "Welcome to Asana"

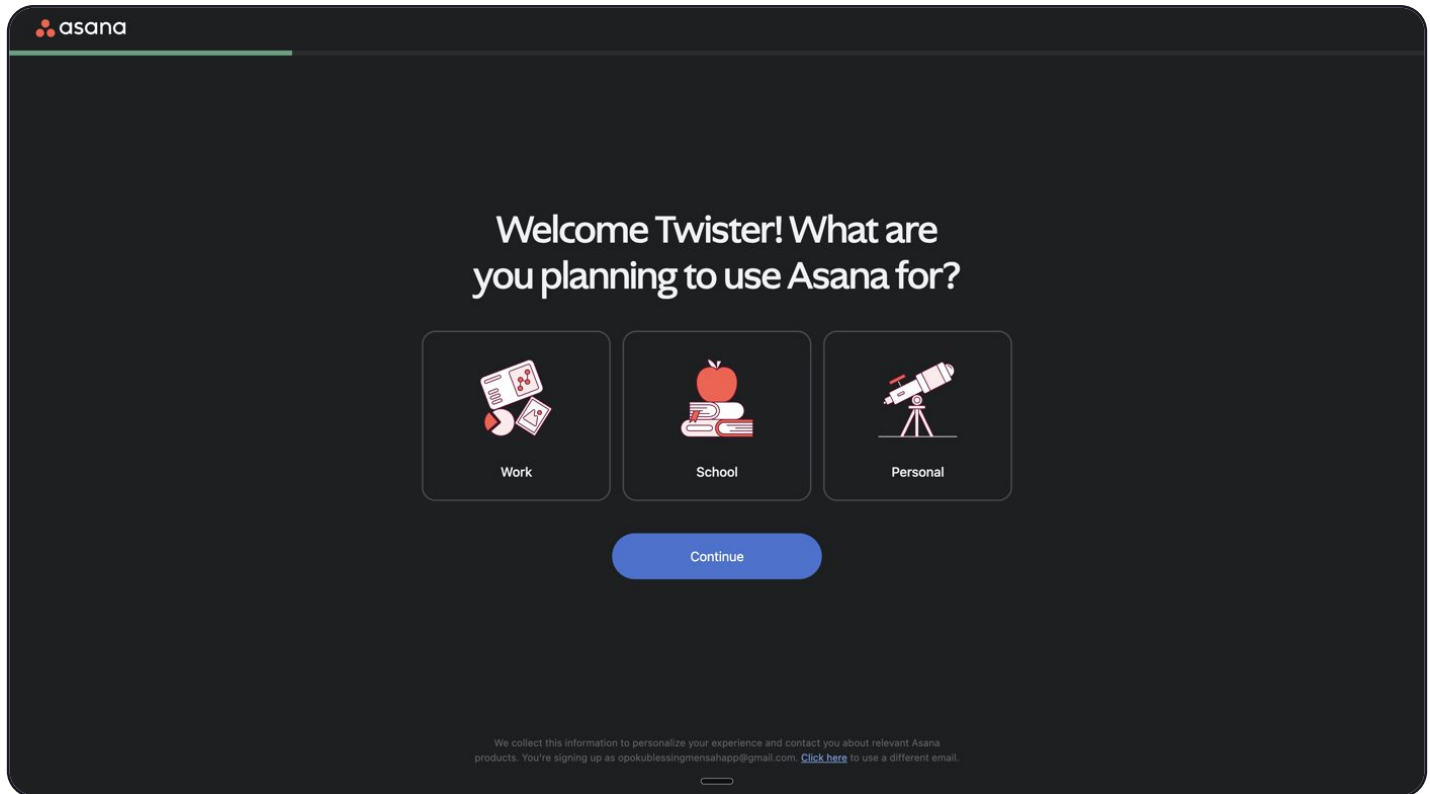


What's working "It will take about a minute" is a strong effort-expectation setter — naming a small time cost is one of the most reliable ways to reduce abandonment before a flow begins. Single CTA, no competing choices.

#	FINDING	PRINCIPLE	SEVERITY
1.1	The entire screen exists to click "Get started." No information is collected and no value is shown — a pure extra step before momentum begins.	Friction	MEDIUM
1.2	No progress indication, even though the next screen's bar is already at ~20%. The head start exists but the user never sees the starting line.	Goal Gradient	LOW

- Fixes**
- Merge this screen into Screen 2: place "Takes about a minute" as the subtitle under the use-case question. One fewer click before momentum starts.
 - If keeping it, add the progress bar here with a visible label: **Step 1 of 4 — about a minute**.

Screen 2 "What are you planning to use Asana for?"



What's working The greeting uses the person's name ("Welcome Twister!") — personalization from word one. The progress bar is already ~20% filled before the user acts on this screen: the endowed-progress effect implemented correctly — an artificial head start nearly doubled completion in the original study (Nunes & Drèze 2006: 34% vs 19%). The choice made here visibly shapes Screen 3's templates, so the question feels consequential rather than bureaucratic.

#	FINDING	PRINCIPLE	SEVERITY
2.1	None of the three cards (Work / School / Personal) is pre-selected. This is the highest-traffic decision in the flow and it starts blank.	Smart Defaults	HIGH
2.2	"Continue" is a generic CTA carrying no information about what the choice unlocks.	Smart Defaults	LOW
2.3	Progress bar is unlabeled — no step count or percentage.	Goal Gradient	MEDIUM

Fixes

- Pre-select the most common option with a subtle **Most popular** tag. Better: infer it — a gmail.com signup (visible in this screen's footer) likely means Personal; a corporate domain means Work. That turns a demographic question into a confirmation.
- Add **Step 2 of 4** beside or beneath the bar.
- Optional copy: **Continue → Set up my workspace** to preview the payoff.

Screen 3 "Let's create your first project"

asana

Let's create your first project

Pick one below to start with. You can always create more later.

Personal to-dos
Keep track of everyday tasks and personal errands in one place

Travel planner
Plan trips from start to finish, from booking to packing

Home improvement tracker
Manage renovations, repairs, and home projects big and small

Or describe it in your own words

e.g. Plan my wedding vendors and payment deadlines

Continue

Start with blank project

← Back

What's working This is ownership & endowment done properly. The user is making something theirs — choosing or describing their first project — and the templates shown (Personal to-dos, Travel planner, Home improvement tracker) are contextually filtered by the "Personal" choice from Screen 2, proving the earlier answer mattered. The free-text field with a concrete placeholder ("e.g. Plan my wedding vendors and payment deadlines") invites ownership in the user's own words. "Start with blank project" is a clean escape hatch.

#	FINDING	PRINCIPLE	SEVERITY
3.1	No template is pre-selected and "Continue" is visibly disabled (grayed out) until a choice is made. A disabled primary CTA is the anti-default: it blocks momentum and forces a decision under uncertainty.	Smart Defaults	HIGH
3.2	Five effective options (3 templates + free text + blank project) at equal visual weight — mild choice overload at the exact moment speed matters.	Cognitive load	LOW

Fixes

- Pre-select **Personal to-dos** (the natural default for the Personal path) so Continue is live the moment the screen loads. The user's job becomes scan-and-adjust, not decide-from-scratch.
- Visually promote the pre-selected card (border + checkmark) and slightly de-emphasize alternatives.

Screen 4 "Invite a teammate to try Asana together"

What's working The subtitle references the user's own project by name — the "Personal to-dos" chip — a genuinely nice endowment touch: the thing they just built is already treated as real. "You are starting a 14-day Advanced trial. No credit card required" is a well-placed trust signal. Starting users on the Advanced tier is quietly smart loss-aversion setup: at trial end they'll be losing features, not evaluating a purchase.

#	FINDING	PRINCIPLE	SEVERITY
4.1	The invite ask comes before the user has experienced the product at all. Zero value received, and the flow asks them to spend social capital on three colleagues — the reciprocity sequence inverted.	Reciprocity	HIGH
4.2	Three empty email fields displayed at once read as an obligation, not an option.	Friction	MEDIUM
4.3	Skipping is implicit — "Go to Asana" happens to work with empty fields, but there is no "Skip for now" affordance; cautious users may stall or feel guilty.	Friction	MEDIUM
4.4	Trial-end copy here is reassuring, which is correct — but the trial-end screen is where loss framing should name what the user will lose (their specific projects' Advanced features).	Loss Aversion	NOTE

Fixes

- Best: move the invite to post-activation — after the first task is checked off, prompt: **Personal to-dos works better shared — invite someone?** The user has now received value; reciprocity works for you.
- If it must stay in setup: **one** email field + a **+ Add another** link + an explicit **Skip for now** text link under the CTA.
- Copy: "Go to Asana" is good (destination-framed). Keep it.

Redesign recommendation

Hero screen: Screen 4

Highest-leverage single change in the flow. Redesign spec:

- **Headline:** "Personal to-dos is ready." — their creation, named (endowment)
- **Sub:** "Asana works better together. Add one teammate — or jump in and invite later."
- One email field, + Add another link
- **Primary CTA:** "Go to Asana" · **Secondary text link:** "Skip for now"
- Trust footer unchanged ("14-day Advanced trial, no credit card required")

In the production report, the AI-generated before/after mockup of this screen renders here (Audit+ tier). Mockups are directional — match to your design system.

Prioritized fix roadmap

#	FIX	SCREEN	PRINCIPLE	IMPACT	EFFORT
1	Pre-select "Personal to-dos" template; enable Continue on load	3	Smart Defaults	High	State change
2	Pre-select (or domain-infer) use-case card with "Most popular" tag	2	Smart Defaults	High	State change
3	Add explicit "Skip for now" link on invite screen	4	Friction	Medium	Copy change
4	Reduce invite to 1 field + "Add another"	4	Reciprocity	Medium	Layout change
5	Label the progress bar ("Step 2 of 4")	2–4	Goal Gradient	Medium	Copy change
6	Merge welcome screen into Screen 2	1	Friction	Medium	Flow restructure
7	Move teammate invite to post-first-aha	4	Reciprocity	High	Flow restructure

Ship #1–3 this week — they’re state and copy changes. #7 is the biggest win but requires flow work; #3–4 are the interim mitigation.

Steal this pattern

Smart defaults Spotify's onboarding pre-selects popular genres and lets users deselect; scanning beats deciding.

Post-value invites Figma prompts collaboration invites after you've created your first file, not before; the artifact creates the reason to invite.

Labeled progress LinkedIn's profile-strength meter names the level and the next step, never just a bar.

Dark pattern audit

None detected. Trial framing is honest, skip paths exist (if implicit), no fake urgency, no confirm-shaming. Clean.

Ship the fixes, then **re-scan free within 30 days** to see your new score.

Sample report · Scores reflect behavioral-science heuristics (Iyengar & Lepper 2000 choice overload; NN/g "The Power of Defaults"; Nunes & Drèze 2006 endowed progress; Kivetz et al. 2006 goal gradient; Cialdini reciprocity; Thaler 1980 endowment; Norton et al. 2012 IKEA effect; Kahneman & Tversky loss aversion), applied to visible UI evidence only. · Report template v2.1-business-first