

Demo 2 – Portrait Scenario: Reducing Drop-offs and improving completion rates in Onboarding Flow for TD Active Trader platform

Role: UX Writer at TD Direct Investment Trading Platform

TD was migrating users from the ‘**thinkorswim**’ platform to ‘**TD Active Trader**’ platform where the users had to create a new account to use the additional features that came with the new platform.

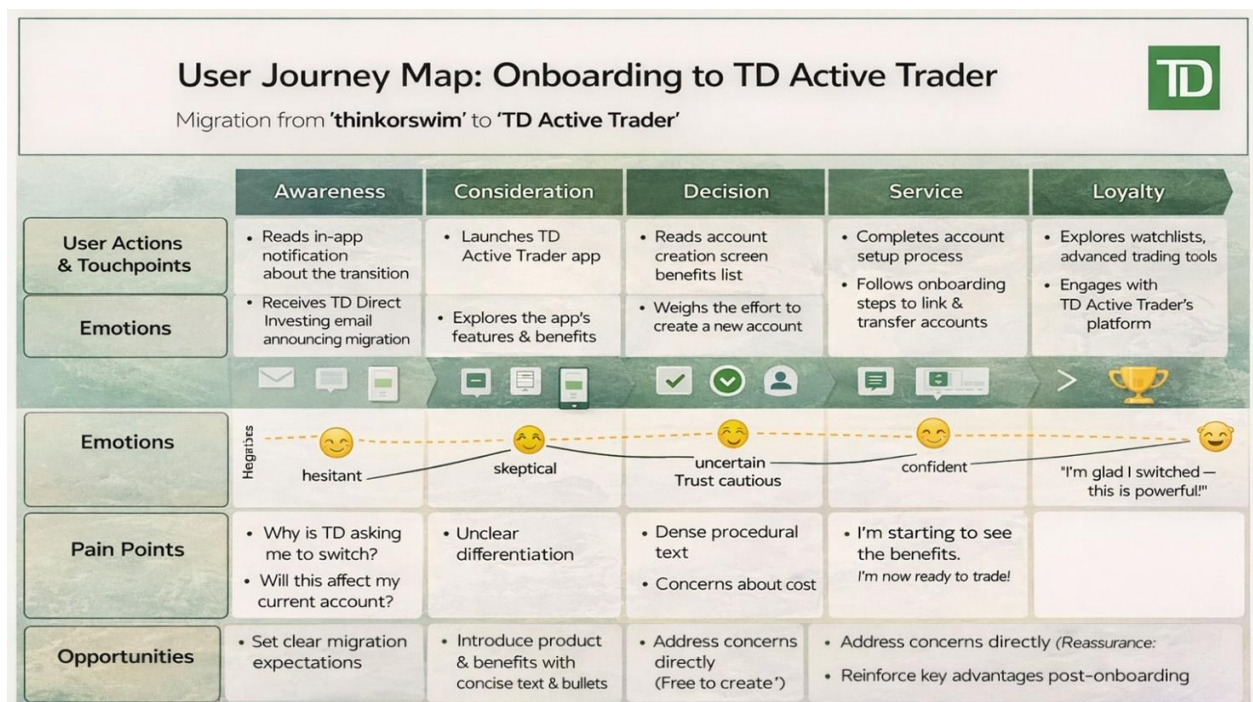
Users migrating from **thinkorswim** were confused by the onboarding screen, as the generic headline “*Welcome to our App*” did not clearly explain what TD Active Trader was or why a new account was required.

Problem identified:

- The existing copy was dense, procedural, and feature-focused, increasing cognitive load at a critical decision point.
- Users were unclear whether the new account impacted their existing TD Direct Investing account, leading to hesitation and trust concerns.
- Lack of clarity on the next steps and benefit-driven messaging and reassurance (such as cost and effort) caused users to hesitate or abandon the onboarding flow, resulting in increased drop-offs during onboarding.

Customer Journey Map for Onboarding feature:

(The image shown below is for representative purpose only, not actual screenshot to adhere to the confidentiality and security policy of TD)



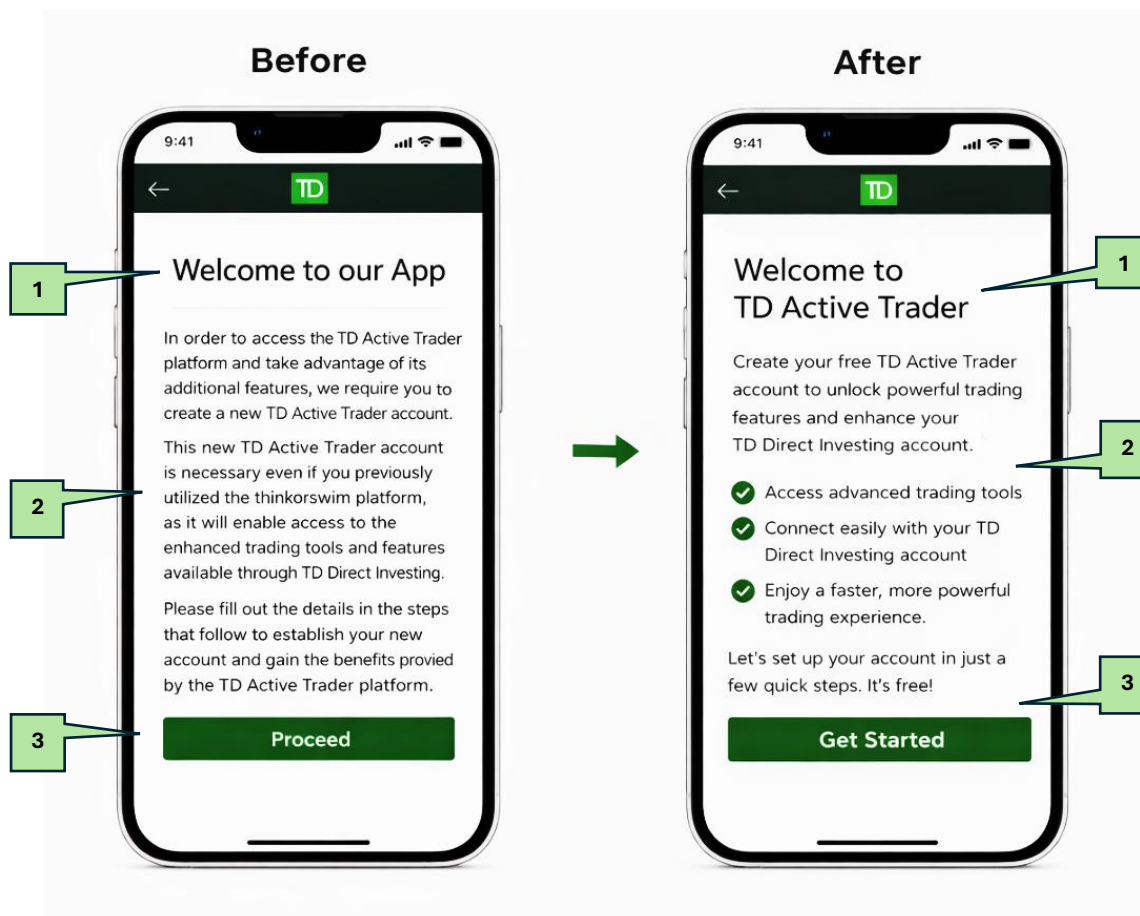
Approach:

- Analyzed onboarding analytics to identify the highest drop-off point (**43% drop-off at account creation step**).
- Audited existing copy for clarity, tone, and alignment with user intent during migration.
- Partnered with Product, Design, and Compliance to align on messaging, regulatory constraints, and user needs.
- Reframed the headline to clearly introduce TD Active Trader and establish context immediately.
- Simplified and shortened body copy, shifting from instructions to user value and reassurance.
- Introduced scannable, benefit-focused bullets to reduce cognitive load.
- Explicitly communicated that account creation is free, addressing a key user concern.
- Updated the CTA to a clearer, action oriented **“Get Started.”**

Solution Screenshots:

- Before: Confusing onboarding screen with long paragraphs.
- After: Clean layout with clear, concise & structured copy.

[The below images are illustrative UI mockups (not actual screenshots) for representative purposes only, to adhere to the confidentiality and security policy of TD.]



Master Copy Document (MCD) artifact

#	Label	Copy	Comments
1	H1	Welcome to Our App	
2	Body Copy	<p>In order to access the TD Active Trader platform and take advantage of its additional features, we require you to create a new TD Active Trader account.</p> <p>This new TD Active Trader account is necessary even if you previously utilized the thinkorswim platform, as it will enable access to the enhanced trading tools and features available through Td Direct Investing.</p> <p>Please fill out the details in the steps that follow to establish your new account and gain the benefits provided by the TD Active Trader platform.</p>	This was the existing copy in the initial test phase
	Body Copy	Create your free Active Trader account to unlock powerful trading features and enhance your TD Direct Investing account.	New edited copy
	Bullet copy	<ul style="list-style-type: none">• Access advanced trading tools• Connect easily with your TD Direct Investing account• Enjoy a faster, more powerful trading experience	
	Body Copy	Let's set up your account in just a few quick steps. It's free!	
3	CTA	Get Started	(In the previous version, this was 'Proceed')

Impact:

- **32%** reduction in onboarding drop-offs at the account creation step.
- **28%** increase in onboarding completion rate post-copy update.
- Post-update user surveys reflected improved user understanding, greater clarity and reduced friction among the users.
- Helped establish a more consistent, user-centered onboarding content pattern for future trading product features.

Task summary:

As a UX Writer for the TD Direct Investing platform, I identified content-related friction in the onboarding flow and rewrote the experience to reduce confusion, build trust, and improved completion rates—while remaining compliant with financial and regulatory requirements.