OBIOMA COVENANT
Product Adoption & Activation Specialist

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VINEYARD PLATFORM

User Experience & Onboarding Audit

Pilot Feedback Report. 5th March, 2026 | Desktop & Mobile

Executive Summary

This report presents structured observations and recommendations from a first-time user experience audit of the Vineyard platform, conducted across both desktop and mobile interfaces. The audit covered four core user flows: account and service setup (consultant profile), e-commerce product store setup, digital product setup, and the bookkeeping feature including transaction entry and investment setup.

Vineyard has built something with genuine market potential. The concept is well-positioned and the feature set addresses real pain points for creators and small business owners. However, the audit identified consistent onboarding and usability gaps across both platforms that are currently limiting how quickly new users reach their first meaningful win; the critical moment where retention begins.

The observations in this report are prioritized to help the Vineyard team focus on the highest-impact improvements first. The goal is not to critique but to help a strong product realize its full potential through a smoother, faster path from signup to active use.

Audit Scope

Desktop

- Account setup as a consultant and service provider
- E-commerce product store setup for a physical product
- Bookkeeping feature — transaction entry, bank connection, and investment setup

Mobile

- Bookkeeping — transaction type selection and recording flow

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- Digital product setup — full end-to-end flow
- Paid Telegram channel setup — full end-to-end flow
- Post-setup activation experience

All observations reflect the perspective of a first-time user with no prior exposure to the platform. No assistance, tutorials, or documentation were consulted during testing.

Key Performance Observation

Time to complete a single service page setup (desktop): 23 minutes (2:08 PM – 2:31 PM)

Industry benchmark for optimized SaaS onboarding: under 10 minutes to first product live.

Reducing this gap is the single highest-impact improvement available to the Vineyard team at this stage. Every additional minute of setup time increases the likelihood of abandonment before activation.

Section 1 — Desktop Observations & Recommendations

S/N	Area	Observation	Recommendation	Priority
1	**Onboarding Flow**	The onboarding form collects all necessary information but the length and sub-questions create significant information overload for new users.	Break onboarding into progressive steps (3–4 screens max). Show only what is needed at each stage and use a progress bar to signal completion.	**High**

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S/N	Area	Observation	Recommendation	Priority
2	**Signup vs. Setup Clarity**	There is no clear visual distinction between the signup page and the setup page. Users cannot tell when one ends and the other begins.	Use distinct page headers, colour cues, or a labelled stepper (e.g. Step 1: Create Account → Step 2: Set Up Your Store) to guide users through each phase.	**High**
3	**Completion Indicators**	The long form-style setup provides no visual cues to show what has been completed, extending onboarding time and increasing user frustration.	Implement a checklist or progress tracker (e.g. 3 of 7 steps completed) so users feel momentum and know exactly where they stand.	**High**
4	**First Win / Activation**	There is no clear definition of what constitutes a win for a new user. After setup, users are left unsure whether they have done enough to go live.	Define and communicate a clear activation milestone (e.g. 'Your first product is live!'). Celebrate this moment with a confirmation message or visual cue.	**High**
5	**Guided Setup**	There is no guided setup or onboarding walkthrough. The platform assumes users will navigate independently from the start.	Introduce an optional guided tour or tooltip system for first-time users. Even a simple 3-step walkthrough significantly reduces drop-off.	**High**
6	**Technical Assumption**	The platform assumes a level of technical familiarity that many creators and non-technical business owners will not have.	Audit all setup screens for jargon. Replace technical terms with plain-language labels and add inline help text or tooltips where context is needed.	**Medium**

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S/N	Area	Observation	Recommendation	Priority
7	**Terminology Alignment**	'How Much' was used to represent quantity (Qty), which is confusing and could lead to input errors during product setup.	Conduct a full terminology audit. Use labels that match everyday language (e.g. Quantity, Price, Units) consistently across all flows.	**Medium**
8	**Bookkeeping UX**	Transaction description options such as 'I repaid a debt' appeared as a long clickable list rather than a structured dropdown menu.	Convert long option lists into categorized dropdown menus to reduce visual clutter and speed up data entry.	**Medium**
9	**Bank Connection**	Difficulties were encountered during the bank account connection process. The flow was unclear and error states were not informative.	Review the bank connection flow for clarity. Add step-by-step guidance and improve error messaging to tell users exactly what went wrong and how to fix it.	**High**
10	**Investment Setup Error**	An error was encountered during the investment setup process. The error provided no clear resolution path for the user.	Investigate and resolve the investment setup bug. Add a fallback message acknowledging the issue and directing users to support or an alternative action.	**High**
11	**Onboarding Time**	Setting up a single service page took approximately 23 minutes (2:08 PM – 2:31 PM) with significant back-and-forth due to unclear navigation.	Target a setup time under 10 minutes for a first product listing. Track this regularly during pilot testing and use it as a core activation metric.	**High**

Section 2 — Mobile Experience Observations & Recommendations

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Mobile testing was conducted across four distinct setup flows on the Android mobile browser. The observations below are specific to the mobile experience and supplement the desktop findings above. Several issues identified on desktop were found to be more severe on mobile due to limited screen space and touch interaction constraints.

Critical Finding: The 'Contact Support' button floats permanently over content on every mobile screen across all tested flows, blocking fields and instructions. This can actively causes errors and abandonment.

Activation Gap: After completing bookkeeping setup, users are celebrated but given no next step. This is the highest-value activation moment on the platform and it is currently being missed.

S/N	Area	Observation	Recommendation	Priority
1	**Floating Support Button**	The 'Contact Support' button floats permanently over content on every screen across all tested flows, blocking form fields, instructions, and answer options.	Collapse the Contact Support button to a small icon by default on mobile. Expand only when tapped. This is the single most disruptive UI issue on mobile.	**High**
2	**Information Hierarchy**	Multiple unrelated question categories are stacked on the same scroll with no visual separation, making it impossible to distinguish where one section ends and another begins.	Introduce clear visual dividers, section headers, or separate screens for each distinct category (e.g. Channel Type, Pricing, Description as separate steps).	**High**
3	**Post-Setup Activation Gap**	After completing bookkeeping setup, the platform displays a celebration message but provides no prompt or next step. Users are left stranded	Follow the celebration screen with a single clear call to action — 'Now let's record your first transaction.' This is where retention begins.	**High**

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S/N	Area	Observation	Recommendation	Priority
		at the most critical activation moment.		
4	**Wrong UI Elements**	Optional fields use radio buttons instead of checkboxes or toggle switches, implying mutual exclusivity and creating user confusion about whether an option is on or off.	Replace radio buttons on optional fields with checkboxes or on/off toggle switches. Reserve radio buttons for mutually exclusive required choices only.	**Medium**
5	**Advanced Features in Basic Flow**	Advanced options such as early bird pricing, purchase caps, product tiers, and upsell configuration appear during the core first-time setup flow, overwhelming new users.	Separate core setup from advanced settings. Lock advanced features behind an 'Advanced Settings' section that users opt into after completing basic setup.	**High**
6	**Duplicate Upsell Questions**	Two near-identical questions appear back to back — upselling other products and add-on services — with no clear distinction between them.	Consolidate into a single 'Cross-sell & Add-ons' section with clear sub-options, or move both to the advanced settings area.	**Medium**
7	**Social Media Form Design**	Three individual optional social media fields (Instagram, TikTok, LinkedIn) are each displayed as full labelled form items, consuming excessive screen space.	Consolidate into a single compact 'Social Media Links' card that expands when tapped. Use a minimal icon-based layout.	**Medium**
8	**Disabled Done Button**	The 'Done' button appears greyed out at the end of setup with no indication of why it is disabled or what field is still incomplete.	Highlight incomplete fields with a clear error indicator when the user taps Done, or display a summary of what is	**High**

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S/N	Area	Observation	Recommendation	Priority
			still required above the button.	
9	**Verbose Question Labels**	Questions such as 'How many units of this product/service did the customer buy?' use full sentence phrasing where a short label would suffice, adding unnecessary reading load.	Audit all form labels for brevity. Short labels (e.g. 'Units sold', 'Sale price') with optional helper text beneath are more readable on mobile.	**Medium**
10	**Content Cut Off at Scroll**	Multiple screens begin mid-sentence at the top because the previous scroll position was not preserved, leaving users without context for the current question.	Ensure each scroll position anchors to the start of a complete question or section. Never allow a screen to open mid-sentence.	**Medium**

Priority Summary

Priority	Desktop	Mobile
HIGH	Onboarding flow, signup/setup clarity, completion indicators, first win, guided setup, bank connection, investment error, setup time	Floating support button, information hierarchy, post-setup activation gap, advanced features in basic flow, disabled Done button
MEDIUM	Technical assumption, terminology alignment, bookkeeping UX	Wrong UI elements, duplicate upsell questions, social media form, verbose labels, scroll context loss

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Closing Note

Vineyard has built something worth refining. The core value proposition is clear and the feature set is genuinely competitive. What the platform needs most at this stage is not more features — it is a smoother, faster, and more forgiving path from signup to first win.

The highest-priority fixes centre on three things: resolving the floating support button on mobile, restructuring the onboarding flow on both platforms to reduce cognitive load, and defining a clear activation moment that tells users they have successfully done something meaningful.

Addressing these will meaningfully improve conversion from signup to active user — and that is where Vineyard's retention story truly begins.

I am happy to discuss any of these findings in more detail or assist in thinking through how to prioritize and sequence improvements.

Obioma Covenant

Product Adoption & Activation Specialist

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March 2026 | Pilot User Feedback — Vineyard Platform

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Vineyard | Sell Products, Tickets &

https://getvineyard.com

Chat

Vineyard

Login

Search or explore outfits

Sell anything online in 5 minutes

✓ No monthly fees ✓ No coding required

Sell digital downloads, physical goods, event tickets, courses, subscriptions etc to customers anywhere in the world.

Plus, track your sales, inventory, and net profit with our free built-in Bookkeeping Ledger.

Sign up now for Free

What users are saying:

★★★★★

"I've spent time exploring [...] Vineyard, and I'm genuinely impressed. The way you've integrated selling, bookkeeping, funnels, and attribution analytics into one seamless platform is exactly what creators need...

Lucy GH
Brand Strategist

★★★★★

"I checked out Vineyard anc the platform and can tell yo really like how straightforwa built with creators in mind, who already have an audier

Timileyin FI
Business Administrator

HOW TO USE VINEYARD

Contact Support

94°F
Partly sunny

Search

2:04 PM
3/2/2026

Vineyard

https://getvineyard.com/app/home

Search or explore products

Sell your service
Consulting, CV review, bootcamps, essay writing, etc

Bite-sized masterclass
Deliver course/content to users little by little as daily emails.

Virtual event / webinar
On YouTube, Spaces, Zoom, IG Live etc

Physical event
Sell tickets & check attendees in using ticket number/QR code

Consultation call / meeting
On Zoom or Google Meet. Vineyard automatically generates links.

Paid Telegram group chat
Vineyard automatically handles addition & removal of members

Create a shop
Sell multiple physical & digital products

Subscription service
E.g. membership subscription. Auto-renews until cancelled.

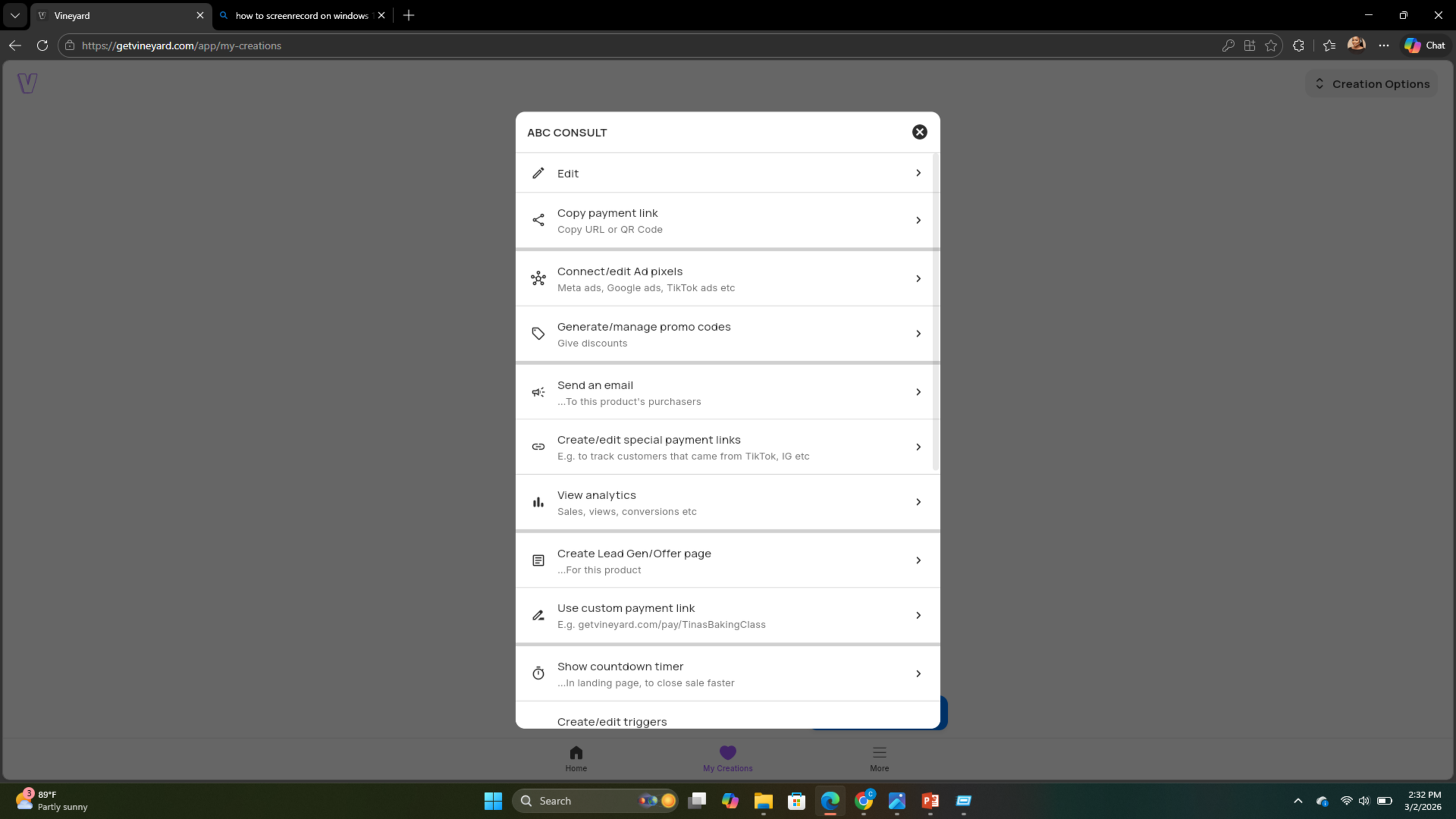
Contact Support

Home | My Creations | More

Tomorrow's high
To tie record

Search

2:09 PM
3/2/2026


Vineyard
how to screenrecord on windows
https://getvineyard.com/app/my-creations
Chat
Creation Options
ABC CONSULT
Edit
Copy payment link
Copy URL or QR Code
Connect/edit Ad pixels
Meta ads, Google ads, TikTok ads etc
Generate/manage promo codes
Give discounts
Send an email
...To this product's purchasers
Create/edit special payment links
E.g. to track customers that came from TikTok, IG etc
View analytics
Sales, views, conversions etc
Create Lead Gen/Offer page
...For this product
Use custom payment link
E.g. getvineyard.com/pay/TinasBakingClass
Show countdown timer
...In landing page, to close sale faster
Create/edit triggers
Home
My Creations
More
89°F
Partly sunny
Search
2:32 PM
3/2/2026

9 out of 10 steps completed

- [ ] Sell to first set of purchasers at a lower price

- [ ] This service should have a maximum number of available slots.

Your price for this service is a...

- [x] Fixed price
  Just ₦10,000
- [ ] Per-unit price
  E.g. ₦10,000 per hour, ₦10,000 per tweet etc

Does your service have any tiers/plans?

E.g. Basic plan, Pro plan, Premium tier

- [x] No
- [ ] Yes

We'd send you the client's email & phone number after they book your service.

Do clients have to fill a form before booking your service?

- [x] No
- [ ] Yes

Describe what users get when they book your service:

Enter description, screenshots of reviews, proof of your credibility etc. Convince potential clients...

Contact Support

Home | My Creations | More

MySQL Workbench

Local instance MySQL80

File Edit View Query Database Server Tools Scripting Help

Navigator

SCHEMAS

Filter objects

- covenantdb
- orders
- sakila
- sql_hr
- **sql_inventory**
  - Tables
    - products
  - Views
  - Stored Procedures
  - Functions
- sql_invoicing
- sql_store
- world

Administration Schemas

Information

Table: products

Columns:

product_id	int AI PK
name	varchar(5
quantity_in_stock	int
unit_price	decimal(4

Object Info Session

Query 1 orders order_items

Limit to 10 rows

```
1 • SELECT *
2   FROM sql_inventory.products
3   WHERE quantity_in_stock IN ('49', '39', '72')
```

Result Grid Filter Rows: Edit: Export/Import: Wrap Cell Content:

product_id	name	quantity_in_stock	unit_price
2	Pork - Bacon,back Peameal	49	4.65
NULL	NULL	NULL	NULL

products 2

Apply Revert

Output

82°F Partly sunny

Search

10:11 AM 3/4/2026

Vineyard

https://getvineyard.com/app/home/create-service

Chat

Add another availability period >

On Saturdays...

I'd be available

I'd not be available

(Optional) Connect your Calendar

Connect Google Calendar >

Connect Microsoft Calendar >

(Optional) require that users fill a form before booking this consultation add-on

Where should the meeting hold?

Google Meet

Zoom

(Optional) automatically select this add-on for the customer

Describe the add-on service/product:

to get to know you better.

Add Add-on

94°F
Partly sunny

Search

2:17 PM
3/2/2026

Vineyard

https://getvineyard.com/app/auth-gate?redirectTo=/home

Chat

Vineyard

Continue with email

Enter your email address...

Done

or

Continue with Google

By continuing to sign up or login, you agree to our privacy policy & terms of use.

Contact Support

Hot days ahead
94°F

Search

2:05 PM
3/2/2026

10 out of 10 steps completed

E.g. ₦10,000 per hour, ₦10,000 per tweet etc

Does your service have any tiers/plans?

E.g. Basic plan, Pro plan, Premium tier

- [x] No
- [ ] Yes

We'd send you the client's email & phone number after they book your service.

Do clients have to fill a form before booking your service?

- [x] No
- [ ] Yes

Describe what users get when they book your service:

Enter description, screenshots of reviews, proof of your credibility etc. Convince potential clients...

A consultation service for XYZ

Contact Support

Home | My Creations | More

Vineyard

https://getvineyard.com/app/auth/signup?redirectTo=/home

Chat

Vineyard

Creating Vineyard account...

Enter password
At least 6 characters
Only a - z and 0 - 9 digits allowed

Create a password

Enter your surname/last name

Enter surname...

Enter your first name

Enter first name...

About you:
Are you a marketer, influencer, business owner or event host?

- [x] No
- [ ] I'm a digital marketer
- [ ] I'm an online influencer
  coach, courses, mentor, community etc
- [ ] I'm a business owner
  offline or online business
- [ ] I host events
  book clubs, concerts, webinars etc

Finish Creating Account

Contact Support

Hot days ahead
94°F

Search

2:06 PM
3/2/2026

7 out of 10 steps completed

Enter name of service:

E.g. Personal Fitness Coaching

Which locations do you deliver this service to?

Users in all countries can place orders.

All countries (worldwide)

Pricing options:

Charge users for service

Account to receive payments in:

NGN bank account

Currency to charge users in:

₦ Nigerian Naira

Enter price of service

₦ Enter amount

Sell to first set of purchasers at a lower price

This service should have a maximum number of available slots.

Your price for this service is a...

Contact Support

Tomorrow's high
To tie record
Search
2:09 PM
3/2/2026

Vineyard

https://getvineyard.com/app/home/create-service

Chat

9 out of 10 steps completed

Additional Settings

- Show users a message after they purchase service
- Connect/edit Ad pixels
  Meta ads, Google ads, TikTok ads etc
- Use custom payment link
  E.g. getvineyard.com/pay/TinasCoaching
- Show countdown timer
  ...In landing page, to close sale faster
- Create/edit triggers
  E.g. automatically send discounts to users who showed interest but didn't complete purchase
- Show a pop-up message
  ...To users, once they enter product's landing page
- Collect users' emails
  ...Once they enter landing page
- Show message in Order Page
  ...To encourage users to complete order
- Upsell users to another product
  ...After they buy/get this product
- Temporarily pause new purchases of service

Home | My Creations | More

94°F
Partly sunny

Search

2:15 PM
3/2/2026

8 out of 10 steps completed

Change strikethrough price:

₦ 17000

Sell to first set of purchasers at a lower price

Sell to first 25 purchasers at a 40 % discount.

So, price for first 25 purchasers would be ₦6,000

Set expiration date for this lower price

This service should have a maximum number of available slots.

Your price for this service is a...

Fixed price
Just ₦10,000

Per-unit price
E.g. ₦10,000 per hour, ₦10,000 per tweet etc

Does your service have any tiers/plans?
E.g. Basic plan, Pro plan, Premium tier

No

Yes

Contact Support

89°F
Partly sunny
Search
2:19 PM
3/2/2026

URL | QR Code

Service created! 🎉

Below is your Vineyard link for users to book your "ABC CONSULT" service 👇

https://getvineyard.com/pay/SVCMVMmlvHEkC

Add that link to your social media bios, share it with your audience, etc.

- Copy link
- Share to WhatsApp
- Share to Facebook
- Share to X (Twitter)
- Share to LinkedIn
- Share to Telegram
- Share Vineyard link
- Share to Snapchat
- Share to Instagram
- Return to Vineyard Dashboard

89°F Partly sunny
Search
2:31 PM 3/2/2026

9 out of 10 steps completed

We'd send you the client's email & phone number after they book your service.

Do clients have to fill a form before booking your service?

- [ ] No
- [x] Yes

Customize form:

Section 1 of Form

Enter question/text for client...

How should the client respond to Section 1?

- [ ] By entering text
- [x] By selecting one option from available options
  3 available options
- [ ] By selecting multiple options from available options

Add another section >

Describe what users get when they book your service:
Enter description, screenshots of reviews, proof of your credibility etc. Convince potential clients...

Contact Support

94°F
Partly sunny
Search
2:13 PM
3/2/2026

mail.google.com/mail/u/0/#search/viney/WhctKLbvWZqD[redacted]

Covenant Obioma

On Mon, Mar 2, 2026, 7:25 AM [redacted] Esq. [redacted] wrote:

Hi Covenant,

Hope your day is going great!

I'm M[redacted]. I follow you on LinkedIn and have been keeping up with your takes on product strategy & retention.

I've found your insights very inspiring, and I'm particularly drawn to how intentional you are about storytelling in today's digital world.

My team and I recently built a platform called Vineyard, and I wanted to get your feedback given your expertise in the digital space.

Vineyard helps creators seamlessly sell anything online -

- webinars,
- coaching calls (vineyard generates the meeting link),
- digital products,
- courses,
- templates (canva, notion, chatgpt prompts), etc.

But here's the actual interesting part:
Vineyard does for *selling* what Notion does for *writing* - it takes selling from basic transaction processing to a full-blown automated system.

We built powerful add-ons right into the platform for free:

- **Multi-Currency Bookkeeping**: Ability to track your personal & business income, expenses, debt, taxes and investments [e.g. ETFs, REITs, stocks] in over 100 currencies. (You really need to try this feature - it is amazingggggg)
- **Automated Funnels**:
  - **Triggers to upsell customers** automatically from a freebie or low-priced product to a high-ticket 1-on-1 service or consultation.
  - **Ability to notify past customers** of new product drops (this is automated, so you don't have to do anything).
- **Attribution**: "Special Payment Links" to track exactly which platform (Twitter vs IG) drove a specific sale (instead of just sharing the same payment link everywhere).
- **Conversion Tools**: Native A/B testing and countdown timers to drive urgency.

We are currently piloting & refining Vineyard with a few digital natives, and I'd value your input immensely.

It takes about 15 seconds to sign up (and works perfectly on mobile browsers): https://getvineyard.com/

Warm regards,
[redacted], Esq.

mail.google.com/[redacted]CxgnbXVsrbbbPPpsjFFDKnhqWLXkcQHcdWtWqNB

Gmail

in:sent vine

Upgrade

C

Hi [redacted],

Thank you for the opportunity to explore Vineyard. I've completed my review across both desktop and mobile, and I've put together a structured feedback report which I've attached to this email.

The report covers four key flows: service setup, e-commerce store setup, digital product setup, and the bookkeeping feature; with observations and specific recommendations across both platforms.

A few headline findings worth flagging:

• I found that setup time on desktop ran to approximately 23 minutes for a single service page which is well above the sub-10-minute benchmark for optimised SaaS onboarding. The report unpacks exactly why and what to address first.

• On mobile, a floating 'Contact Support' button persistently overlays content across every screen, which is actively blocking user interactions and needs urgent attention.

• The platform currently misses the single most important activation moment; when a user completes setup, there is no clear next step or first win defined. That gap is where early drop-off begins.

I've prioritised all findings as High or Medium so your team can sequence improvements effectively.

I'm happy to walk you through the report or discuss any of the findings in more detail ; whatever is most useful to you at this stage.

Best regards,
Obioma Covenant
Product Adoption & Activation Specialist
covenantstephen7@gmail.com
linkedin.com/in/covenant-obioma

One attachment • Scanned by Gmail ⓘ Add to Drive



Reply Forward