

Device Migration — Copy Doc

Documentation - [PRD](#), [Figma](#)

URL - <http://mzl.la/newdevice>

Background

The goal of this effort is to improve retention. This time of year, combined with the announcement that Chrome will not be supporting Windows 7, leads us to expect a higher drop-off rate of Firefox users as they purchase new devices. We predict that by making it easier to transfer their saved data, namely bookmarks and passwords, we can improve the retention among existing users that switch devices. We hope to accomplish this by prompting users on their current devices to turn on sync, back up their data, and stay signed in to their account, as well as creating a new entry point for manual data migration.

Copy goals

1. Establish an entry point for manual migration that is more discoverable than the previous manual migration route
2. Encourage users to start syncing their accounts at moments when they will be most inclined to turn on the feature
3. Assist in designing a SUMO flow that walks users through the migration process in the most helpful and easily comprehensible way possible

Design solution

1. Focus on creating multiple entry points to the backup experience
 - a. Due to time constraints, it's predicted to have the biggest impact relative to the time allotted
 - b. Future iterations include this messaging directly in the settings menu
 - c. The specific users we're targeting may not be aware of their need to back up data, so notifying them rather than simply including this information in a menu is predicted to have a more positive impact
2. Direct users to an interactive SUMO article

- a. Users can set up their sync settings in context - those looking to transfer devices specifically
- b. It allows the sync option and the manual data migration flow to be conceptually close for the user, so both target audiences can better distinguish what applies to them and begin the process from the same entry point

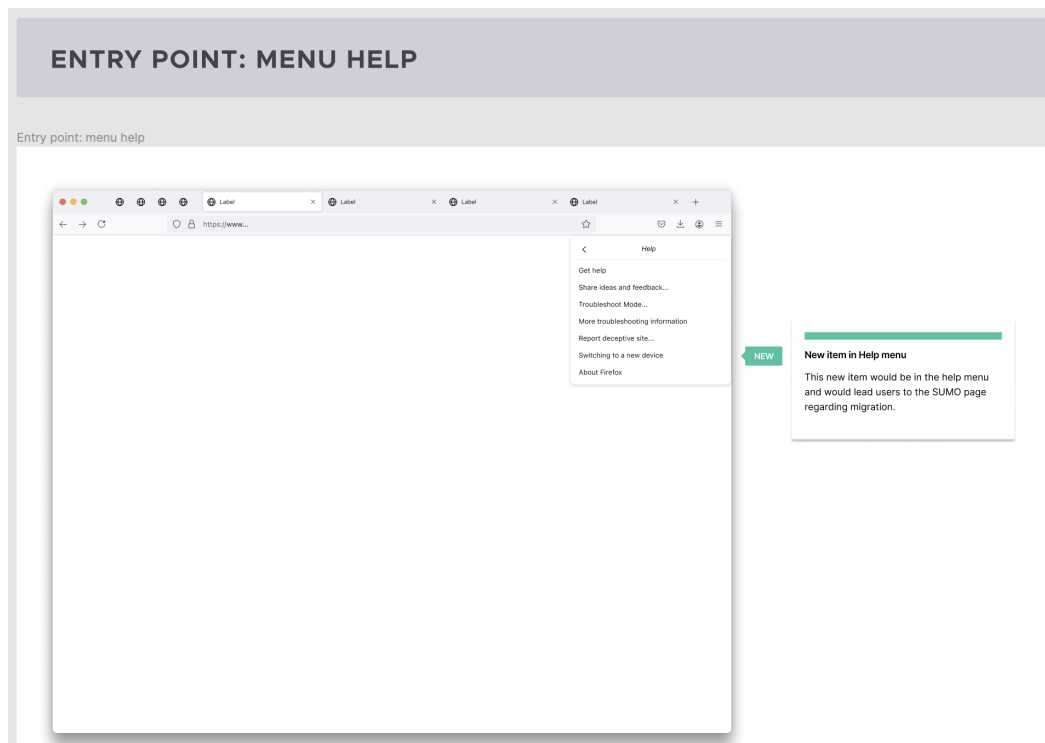
Editorial process

- ☒ Content review ~~Jeff Pfaller~~
- ☒ UXD review ~~Tatiana Mirson~~
- ☒ UXD review ~~Markus Jaritz~~
- ☒ PM review ~~Ray Fambro~~
- ☒ Engineer review ~~Mike Conley~~
- ☒ Localization review ~~Francesco Lodolo~~
- ☒ Localization review for updated spotlight modal ~~Delphine Lebedel~~
- ☒ Legal review ~~Michael Feldman~~

Item 1

[Entry point label for manual migration in the Help menu](#)

Label: "Switching to a new device"



Documentation & reasoning

Element	Concerns	Rationale
"Switching to a new device"	Shannon French This language may not capture users that are looking to back up data without switching devices Does not match possible user mental model of "importing" data Stuart Colville Reads like a question vs menu action	The "switching to a new device" language is intended to capture the expected drop-off of Firefox users with both the typical summer slump, and the decreased support for Windows 7 machines. While the entry point could be used for other scenarios, the more specific language was chosen to target the most critical user group. Naming the scenario in which the user would want to migrate data (rather than naming the action of transferring data itself) is predicted to better match the user's mental model when searching for <i>help</i> with that topic, vs "import" which would be expected to lead them to the actual UI action. If/when we combine this with the settings menu, it may make more sense to frame this label around "importing"

		bookmarks and passwords” etc., but as of now we send them to SUMO article anyway, so this location and framing best matches our current capabilities.
Location of item in help menu	Mike Altman Should it be higher priority?	Located is fixed in next-to-last based on expected priority levels, it is a less common action, but the About item remains in the last position to anchor the menu with the least-commonly needed information. See Firefox Menus: Content Design Principles

Notes for future improvements

- The contents of this SUMO article may become applicable to more users than just those *switching to a new device*, there may be words that better capture all interested users
- When manual data migration is integrated into the settings menu, the terminology here may need to be updated to align, so that we use consistent language when referring to the same functionality

Item 2

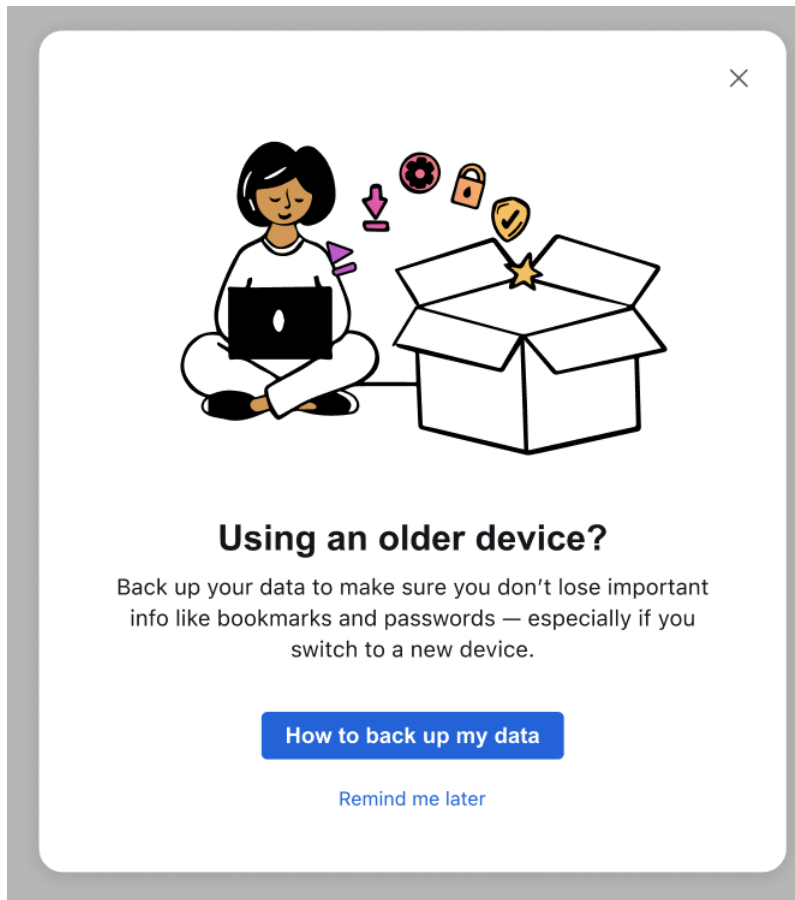
[Spotlight modal](#) - User doesn't have account or sync set up

Header: “Using an older device?”

Body: “Back up your data to make sure you don't lose important info like bookmarks and passwords — especially if you switch to a new device.”

CTA: “How to back up my data”

Soft close: “Remind me later”



Documentation & reasoning

Element	Concerns	Rationale
"Using an older device?"	Jeff Pfaller Could this be interpreted offensively to users that have no intent or awareness around replacing a device?	Decision to push for "older devices" language to target our users - those soon to lose support, while not being so explicit as to exclude other users
Question format		Readers have a natural urge to keep reading content formed as a question, which can lead to stronger engagement. As this message is framed as to subtly tip user to upcoming changes, the question enforces the level

		of focus and attention we want from them here- a reason to get a new device is a fairly serious concern.
Body text	Shannon French Do users connect the "older device" header with why they would need to back up data?	Short length prioritized, relying on (testing for) users ability to infer that older devices may be more prone to losing important data rather than providing those words. "Like bookmarks and passwords" added for examples to ensure that users have an idea of what info they could lose.
Voice & tone		Message is framed as a helpful, subtle cue that there might be a change coming soon, but this action can set them up for success

Experiment version #1

Header: "Using Windows 7 or older?"

Body: "Older devices won't always have the most updated and secure version of Firefox.

Backing up your data helps make sure you don't lose important info — even if you switch to a new device."

CTA: "How to back up my data"

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Using Windows 7 or older?

Older devices won't always have the most updated and secure version of Firefox. Backing up your data helps make sure you don't lose important info — even if you switch to a new device.

[How to back up my data](#)

[Remind me later](#)

Documentation & reasoning

Element	Concerns	Rationale
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Calling out "Windows 7" audience	James Stephens II All users are at risk for churn, not just Windows 7 Ray Fambro Does this leave out other relevant users from Windows 10, beyond just Windows 7? John Cook Calling out operating system could highlight info a user doesn't know in a way that isn't as kind/helpful	- Strongest way to catch attention of most vulnerable audience (those most likely to have to switch devices and lose Firefox), chosen over more generic messaging to get the strongest attention from the most affected users - Assumption is made that users that know their operating system will read the body text to see <i>how</i> this applies to them, and users that are unsure will read to see <i>if</i> it applies to them- both covered in this design <i>Enough reservation here to push this message to an experiment vs primary message</i>
Question format	Ray Fambro Asking direct question users may not know the answer to could introduce uncertainty	Messages go out to all users on Windows 10 or older, but not all users that see this message will be equally likely to drop off with the summer slump/new device hurdle Assumption that those that know their operating system will continue to read body copy for relevance, and those that do not will continue to read to see <i>if</i> it is relevant to them
Body text	Shannon French More than three lines decreases likelihood user will read and retain.	- Decision made to increase length in favor of providing specific information to the user about upcoming changes - More generic than header, so users learn why we referenced windows 7 and can apply that info (weaker updates and security on older OSs) to their situation if it isn't windows 7 exactly - First two words peaks to the top concerning question of "why are we calling out Windows 7?" - it implies "specifically W7, but older devices in general have this issue" - Also explains "backing up" data as the key thing that can be important for everyone, new device or not
CTA	Shannon French Longer copy breaks best practices, Ideally should be tied to the same concept as header (Back up your data? + [Back up data])	- This space is the second area users eyes scan, so after seeing "windows 7" they are most likely to scan "how to" and "back up data" - "How to" sets expectations for going to SUMO article, not taking action in this step

		- “Back up data” --> users that aren’t windows 8 or 10 that may not think this message is for them, could still take away that this is an entry point for backing up data generically
Voice & tone		- Message is serious, but helpful, to garner more focused attention from users that may be at risk of losing support - Message is framed as a light-weight warning to give users the info they need to make the decision right for them

Next steps

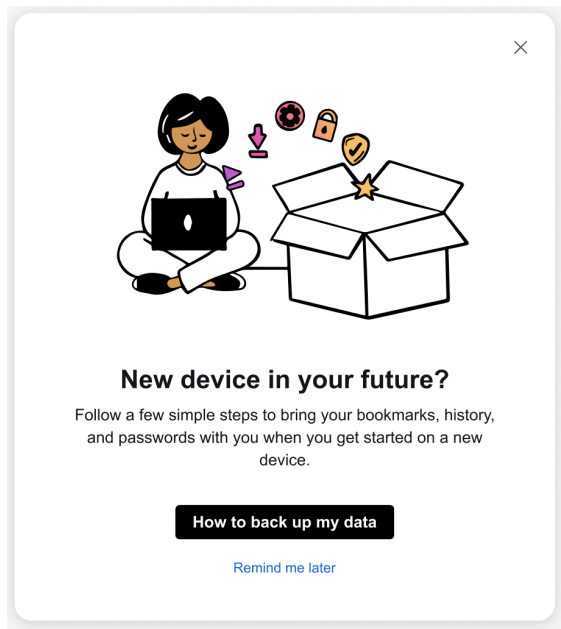
- Determining the specific users most at risk of drop off and evaluating the message framing that drives highest engagement will allow us to combine those two in future iterations, for higher success rates and ultimately improved retention
- Research questions that could inform future improvements
 - Are most Windows 7 users aware of their operating system?
 - Do users understand what “losing support” means and how it will affect them?
 - Do users feeling willing, or reluctant, to back up their data at these points in time?
 - Are there other circumstances or concerns users have that we could solve for to better meet their needs?

Experiment version #2

Header: “New device in your future?”

Body: “Follow a few simple steps to bring your bookmarks, history, and passwords with you when you get started on a new device.”

CTA: “How to back up my data”



New device in your future?

Follow a few simple steps to bring your bookmarks, history, and passwords with you when you get started on a new device.

[How to back up my data](#)

[Remind me later](#)

Documentation & reasoning

Element	Concerns	Rationale
Header	Whole team - Is this too niche of an audience? Many relevant users may not be aware of the support issue	This may be the most straightforward and effective messaging for that particular audience, if we can determine that we may be able to repurpose this?
Body text		Sets expectations that there will be a step-by-step process to follow Mentions "history" over "tabs" in this instance because the link takes the user to the full process, rather than just turning on sync like Item 2 - for a larger process, I assumed that transferring history may be more relevant than currently open tabs.

Notes for future improvements

- Similar to the above concerns about the specific framing, this particular modal may pose the greatest risk of confusion to the user as it interrupts their flow-there may be increased confusion for those that aren't aware their machine may need replacing

Item 3

[Panel message](#) - User has a Fx account but has not enabled sync

Header: "New device in your future?"

Body copy: "Make sure your bookmarks, passwords, and open tabs come with you any time you open a new Firefox browser."

Primary button: "Learn more"

Secondary button: "Remind me later"

New device in your future?

Make sure your latest bookmarks, passwords, and tabs come with you any time you open a new Firefox browser.

Remind me later

Learn more

ENTRY POINT: PANEL

Entry point: Panel

SURFACES WE USE

- Panel

TARGET

Users Win 7
Existing users
With Fx Account
Without sync enable

TRIGGERS

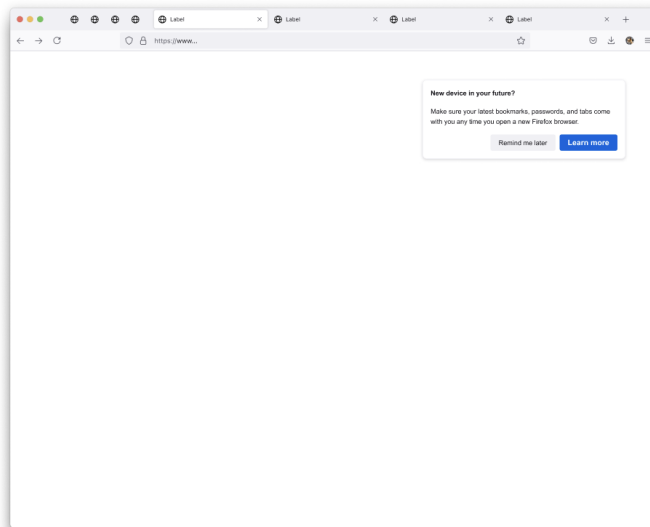
- Idle

BEHAVIOUR

- This message should not overlap with other experiments that has "idle" target.
- Show doorhanger 1 time per user

Notes

- Review the message and where the ctas are taking them to be align into device migration rather than sync.
- We can take users to sumo to sync inside SUMO page.



Documentation & reasoning

Element	Concerns	Rationale
Header		Intended to specifically target the users we are most concerned with losing, those that plan to get a new device and may not continue using Firefox In future iterations, this could be strengthened by addressing a larger group of users and closer tying the

		CTA for <i>backing up data</i> to the reasoning: support will be disappearing soon. When the exact date of pulling support is publicly announced, a message that explains that specific update will likely have stronger engagement
Body text		Intended to remind users with existing accounts, that a new device would require an extra step to ensure all their information comes with them Targets the group of users that would have the greatest consequence for losing data - those that assume sync is set up automatically and plan to get a new device “Bookmarks, passwords, and tabs” chosen (over “history”, the only other capability for manual migration) to highlight the items predicted to be most relevant to a user that did not already initiate a stage in data migration
Voice & tone		Tone aims for gentle, yet specific reminder

Follow-up steps & recommendations for next iteration

- Concern about possibility of this header to generate doubt in users that are not planning to get a new device, “why does Firefox think I’m getting a new computer?” - potential to seem more immediate than intended
- Because this messaging is so much more specific than generic nudges toward syncing, there may be additional performance data we can collect that can inform whether this approach should be pursued, or steered away from in further iterations. (Particularly when it comes to favoring a “back up your data” value prop, rather than a focus on the new device)

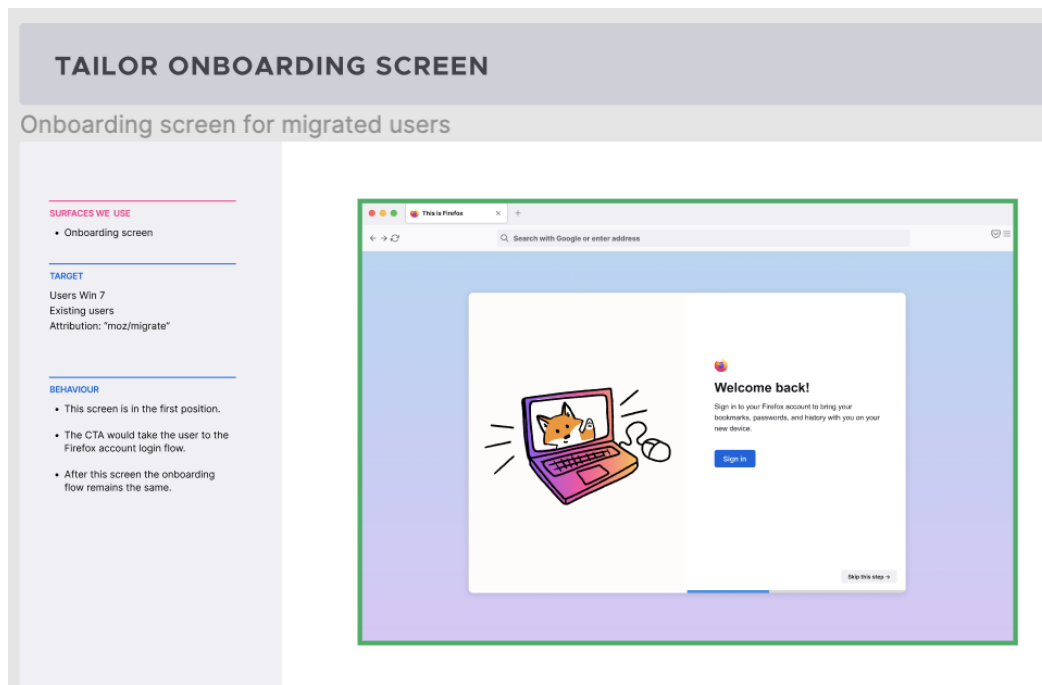
Item 4

[Onboarding screen on new device](#), if user went through migration flow on old device

Header: “Welcome back!”

Body: “Sign in to your Firefox account to bring your bookmarks, passwords, and history with you on your new device.”

CTA: “Sign in” (secondary button copy carried over from previous screens)



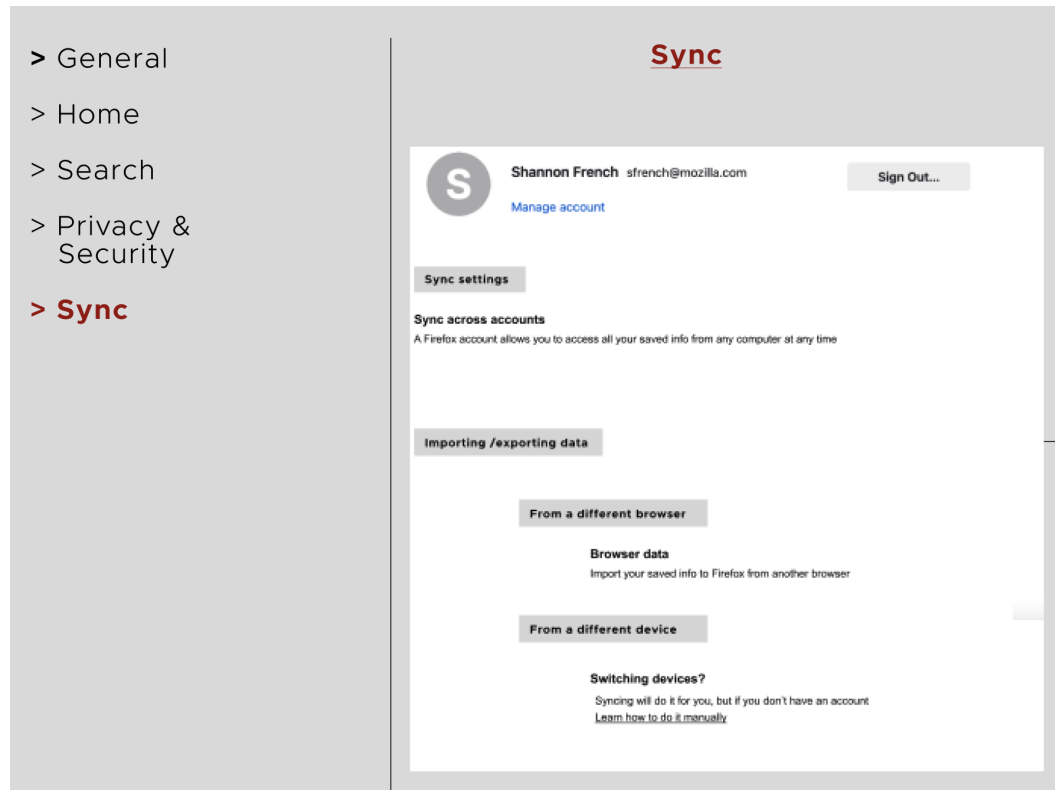
Documentation & reasoning

Element	Concerns	Rationale
Header		Header to address existing user specifically and contextually connect their previous experience of starting this flow on the old device and being told there is a final step
Body text		Language for signing in <i>to their Firefox account</i> is explicit and consistent with their old-device experience and will set expectations for where the CTA leads- as they've seen this flow before
CTA		"Sign-in" is the shortened version of the full action listed in the copy above for ease of button scanning.

Archived content & designs

V1

Entry point iteration



Intent

- Original solution intended to nest migration with the settings menu to make it more discoverable
- Within Settings, language would center around *what* was being backed up and *how* ("import bookmarks", "export data", etc)
- Competitor research showed manual migration nested within importing data from another browser in Chrome, Edge, and Opera - hope was to keep the items grouped by the *action*

Feedback

- This approach may be ideal, but might not fit in with our timing constraints
- We plan to create a SUMO article either way, so could be more beneficial to point users toward that guidance rather than hide it within several layers in the menu

V2

Entry point iterations

> General	General
> Home	Startup
> Search	Import browser data
> Privacy & Security	My data
> Sync - as is	Import from another browser
	Data from another computer -- Have in account? Go to sync -- Otherwise do it manually here
	Downloads
	Applications
	Language & appearance
	Firefox updates
	Performance
	Browsing

Intent

- We explored simpler versions of settings menu adjustments, focusing still on the action the user is taking and grouping it with the existing similar action, “import from another browser.”

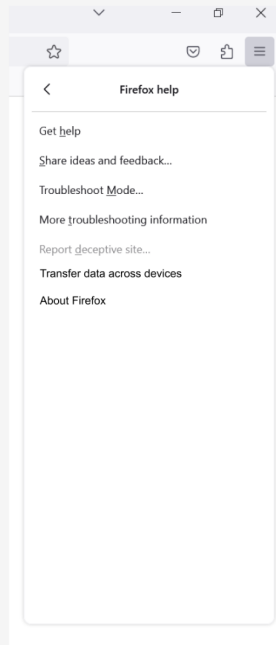
Feedback

- While the action-level grouping makes sense, grouping it within “General” may have less immediate value, the location isn’t logical in context with the other items on the left nav or in the General menu itself
- Concern that even if this works best from an organizational perspective, it requires the user to initiate the discovery, and we may be able to capture more users if we prompt them where it’s most relevant

V3

Four-part messaging surfaces

Help menu entry point



Rationale

- Simplest language for complex action
- Focus on the user goal of transferring stuff from one place to another rather than the specific data action ("migrate", "import," "export")

Pros

- Avoids the primary menu risks
- More contextual- already within the help menu

Cons

- Adds cog load to the existing menu
- Active verbs imply the user will do the thing if they click, gerunds/ "How to" better imply help articles

Questions / Concerns

- Will it be discoverable enough to have an impact on user retention due to data migration?
- Does it matter? Contextual discoverability may be more valuable than relying on high-vis discoverability

Feedback & next steps

- Reframe around user's greater intent - moving devices, rather than the micro-level task of moving specific data
- Align with long-term goal of integrating this step into the settings menu and note language changes needed

Panel message entry point

Using Firefox on multiple devices?

Make sure your bookmarks, passwords, and open tabs stay updated across all your devices. [Learn more about your data](#)

Remind me later

Turn on sync

Rationale

- Header targets specific users – the ones that may be using ff across device but *not yet syncing*
- “Sync your account” first phrase = key message for easiest scanning
- “to make sure” = best attempt at user mental model for why they would choose to sync
- Left button – “Remind me later” *IF* we have that automation set up, “Not now” if nothing specific happens
- Right button – “How to...” – chosen to imply SUMO articles rather than going straight to the sync settings page (which would be “Sync” or “Turn on sync”)

Pros

- Language specific audience for device mig retention, more than a generic recommendation for sync
- More contextual– already within the help menu

Cons

- A button feels a little off for linking to articles, that feels like Learn more link, this might still feel like it’s taking user to settings menu
- Might be more accurate to say “bookmarks, passwords, and *more*” – but I think it’s worth the trade off for the flow of sentence and think we can get by since they go straight to informational article anyway

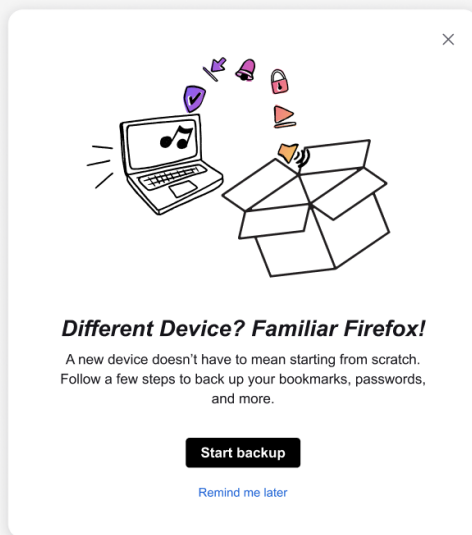
Questions / Concerns

- What does left button actually do?

Feedback & next steps

- The message framing wasn’t quite right - it needs to speak to the change and the *new* device, rather than just a secondary device
- Link text to be more specific about the specific help menu item

Spotlight modal



Rationale

- Repurposing existing copy – minimizes new variables, consistency builds familiarity and concept recognition
- The header doesn't imply what the user can *do* here, so I explicitly stated "sync accounts" in the button text, to aid the scanning and understanding of the screen
- "How to" -- distinguish that this goes to SUMO, not a settings page

Pros

- Consistent messaging, but tweaked for new audience (though it's still in research..)

Cons

- Same reservations around a button for something that's more of a link text item?

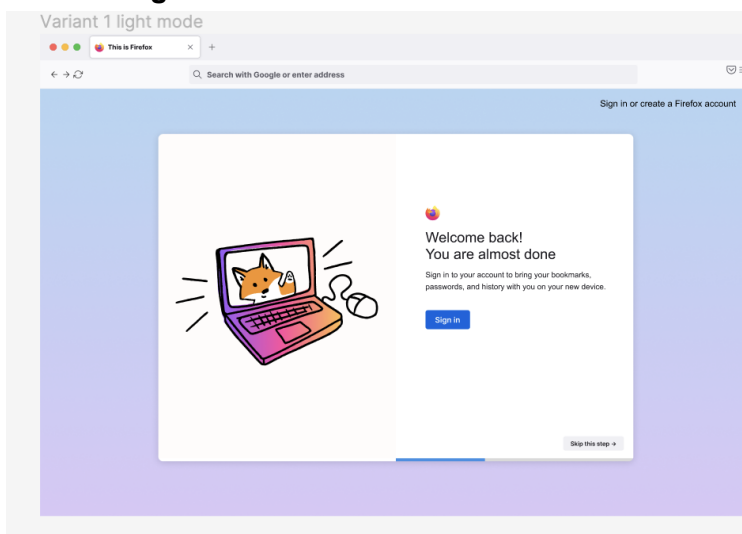
Questions / Concerns

- What does link text actually do?

Feedback & next steps

- The messaging won't be able to be recycled entirely, we want to target a very specific group of users (those that may not know they need to back up) that differs from the generic message for returning users
- "Backup" isn't an existing concept, so we'll need to either use it in a sentence or refer to a different item

Onboarding screen



Rationale

- Header doesn't name action, so made first body text words the users primary action here
- added "sing in to your account" so we can abbreviate in the button
- chose "history" over "open tabs" here assuming that if they've already set up a new device, history may be more valuable than the tabs

Pros

- short! ideal length for onboarding screens
- button is super intuitive– it makes sense on this screen, with this copy, and clear where it's going

Cons

- Not totally clear if user will come back here after they sign in, and/or what screens are next– they may choose not to sign-in in favor of completing the flow?

Questions / Concerns

- Top right text?
- if previous text is already content-designed– lets keep that and not introduce this new version in favor of consistency

Feedback & next steps

- Mostly works contextually, but we don't need top right logo
- We can also make this a contraction and add a period to align with our style guide