# Prioritized Items from the onboarding summit

## Create a team that's accountable for onboarding

We can no longer rely on a piecemeal approach to onboarding. In order to holistically address the biggest issues that the onboarding summit identified, we need a cross-functional team and someone to lead it. This team will be a clearinghouse and point of collaboration for all onboarding projects and responsible for overall vision and management. Creating this team and defining the roles and responsibilities is our first priority.

## Answer the question "Why Firefox?"

A large issue that we identified is that the various touch points involved in Firefox onboarding do a poor job of answering the question "Why Firefox?" They don't give people a good reason to use Firefox instead of another browser. Recent work by the leadership team and Firefox product marketing has been focused on this. We'll need to collaborate with them to translate that work into the various assets needed for website and product content. This is the primary dependency for creating a consistent onboarding experience which the summit attendees identified as the biggest priority.

## Create consistency across the whole experience

This was the largest issue identified by the group. We have various assets created by different teams at different times and it's very clear to someone installing Firefox for the first time. The result is an experience that feels somewhat disjointed at best and confusing at worst. This would be one of the main focuses of a cross-functional team. We'll need a diverse group to reconcile projects and priorities and to create processes that the various teams involved in creating the onboarding experience can use to ensure a cohesive experience.

## Whimsy! Where is the Firefox personality?

Part of providing a consistent experience is ensuring that the Firefox personality is present. This was also seen as an asset to engage people and motivate them to return.

## Put people in control; let them defer decisions

Putting people in control is part of our mission and our design values. It should be part of both how and why we onboard people. There are some fixes we can do here right away (removing the default browser modal dialog for first run) but a more comprehensive pass will be dependant on or done in concert with the "Why Firefox?" and consistency work.

## Fix the old profile problem

The experience for users with old Firefox installations or profiles ranges from slightly confusing to absolutely terrible. Much of the work to address this is engineering related and can happen in parallel with other priorities.

- Allow a "new user" experience subsequent to Firefox being uninstalled - [Bug 1095739](#)

## Quality of experience - things we should just fix

There are a number of known issues and issues brought up at the summit that are just basic quality items that are currently broken. These are things that can happen right away, in parallel with other priorities.

- Remove the default browser modal on first run
- Remove the opt-out default browser checkbox in the installer
- Fix the bookmark where-did-it-go problem [Bug 1210366](#)
- Update footer links on /new to be appropriate and usable to users on all devices who land on page. [Bug 1213372](#)
- Launch first run full screen [Bug 384336](#)
- Defer showing the data choices toolbar to third run [Bug 1199706](#)
- Fix pinning Firefox to taskbar in Windows 7 and 8
- Reader View tour should only be triggered on actual articles [Bug 1210366](#)
- Search engine marketing on Bing, Ask and AOL.

## Encourage multi-device usage

Multi-device users are retained at a higher rate than single-device users or users without accounts. Focusing on this would be best done after completing earlier priorities and might be especially effective where there are benefits to an account besides cross-device sync.

Below here is just me documenting and organizing the post it notes and votes from the summit.

# {26}[8] Flow

- {13}[2] Let users defer decisions.
  - [1] Non-intrusive, never block the user from completing a task.
  - [1] Reduce user annoyances from existing onboarding
  - [.33] Stop pestering users about default right away. Instead, ask at 2nd, 3rd or 4th session. [moved from Comms]
  - [.33] Get rid of default browser modal on first run and remove the opt-out checkbox in the stub installer [moved from Comms]
  - [.33] Don't prompt for default until 2nd run. [moved from Comms]
  - Remind once for deferred decisions
  - Choice to dismiss - and just browse with ability to learn more later. [moved from Consistency]
- [1] Reduce choices or decide on a single flow on MVP onboarding
- [1] Provide guidance at dead ends.
- [1] Show users where they can return for more detail, refresh or re-run of intro. [moved from Profiles]
- Provide multiple options to choose from in terms of onboarding - make default - make pretty (??) - few words
- {2}FxA flow improvements. Get user through. Ask questions later.
  - Remove distractions: Choose what to sync, Sync has begun (or will), Data selection for privacy - Bug 1199706, Non-profit snippets (or improve these)
- Get users to search or type address after Firefox launches
- Offer a walkthrough don't just give it.
- Test only - Require sign up
- Launch first run full screen! Bug 384336 (in progress)
- Make decisions less scary, anxiety-provoking
- ??? ??? retention-friendly activities
- Talk about Pocket for all new users? Test this.

# {17}[5] Value Prop

- {9}[3] Why Firefox?
  - Try variants on selling the Why Firefox on the download page.
  - Reduce Firefox logo to make room for value props

- ○ Show what "non profit," "non corporate," etc. actually mean
- ○ Marketing has clear user benefits
- ○ Test different selling points: privacy, it's ???, non-profit
- [1] Provide examples of how sync is helpful.
- [1] Clear value proposition on each step (not features, but benefits) Pill vs Vitamin
- "Getting Started" action suggestions
- Find out what use cases users are trying to do when choosing Firefox
- Change download pages by how user got there, i.e. game referrals
- Just-in-time recommendations
- Get users to engage with key features - discovery (sync on 2 devices? Pin tab?)

# {11}[5] Process

- {9}[3] Define a team to be accountable for consistent onboarding.
  - ○ [1] Need some actionable items and owners for themes/ideas on onboarding (otherwise we will continue acting like separate teams with inconsistent interfaces)
  - ○ More centralized approach to onboarding.
  - ○ Who is in charge of consistent messaging across teams?
  - ○ Meta issue - figure out how to keep this team/group going post-summit.
- [1] Scalability - ease of updating content
- Overall onboarding experience rather than just trying to fulfill their specific goals (e.g. "download Firefox" or "more Firefox accounts", etc.)

# {24}[5] Consistency

- {16}[1] Provide a clear theme/message across specific onboarding flows
  - ○ [3] Define properties across mobile, web, snippets, desktop, services that we address in a checklist for every campaign to maintain consistency.
  - ○ [.5] Communication between teams for messaging
  - ○ [.5] Common language across platforms
  - ○ One consistent message for ever and ever (until something game changing comes along)
  - ○ Consistent branding and voice everywhere
  - ○ Aesthetic consistency
  - ○ Make branding, messaging consistent for the download experience.
  - ○ The "Disney Experience" of onboarding: polish / focus / delight
  - ○ Coherence / fluidity in firstrun experiences (language, design, ux)

- ○ Maintain visual design consistency between products, services, ads, social posts, web pages. Idea: Quarterly meeting between visual design stakeholders where color pattets, font & tone, etc. are discussed.
- Sentiment <3
- Align button CTA copy - sign in vs. create
- Test whether exposure to "nonprofit" language X times in first X weeks has an impact on retention.
- Non-corporate or nonprofit message
- Communicating compelling reason to create an account
- Consistent tasks
- Overall message - "why are you choosing Firefox?"
- Make sure keywords are defined. What makes it personal? What makes it yours?

# {10}[3] Profiles

- {9}[2.5] Fix the old profile problem please
  - ○ [.5] Refreshing profile on reinstall + if older (non use) 6+ months.
  - ○ Allow a "new user" experience subsequent to Firefox being uninstalled - Bug 1095739
  - ○ New profile provides option to wipe person's profile/data.
  - ○ Determine the ideal flow for a returning user.
  - ○ Design for returning users (how does it relate to old profile)
- Having somewhere a user can go to learn about (try out?) NEW FEATURES! after then are no longer a "new user."

# {9}[4] Tone

- {7}[3] Whimsy
  - ○ [.5] Give users something fun, and allow them to personalize the browser. They must leave happy. Motivate return.
  - ○ [.5] Culture? Personalize your Firefox! (Pick a theme, color, etc.)
- (No panels?) Empty states → Making users do the work → Add a temporally nested website
- 2 levels of info always available: High level, detail level.

# {9}[2] Comms

- [1] Illustrations, not words

- [1] Robust, comprehensive and lengthy lifecycle email campaign
- {3}Better in-product communication (2nd run, 5th run, next week, some particular context, etc.)
  - Framework to allow experimenting with post 1st run messaging.
  - Onboarding focus for first ~2 weeks (6?) (cluster)
- Papercut: Update footer links on /new to be appropriate and usable to users on all devices who land on page. Bug 1213372 (in-progress)
- Improve/validate readability scores of copy, content.
- In product + in comms (like email) do a better job of explaining the value of accounts.
- ??? the potential lift if we send email to users who appear to have stopped using.

# {8}[1] Multi Device

- {5}[1] Focus on gaining more multi-device users. Hypothesis: a multi-device user has better retention.
  - Show multi-device image on accounts first run.
  - Drive cross-platform usage
  - Direct recommendation for activation across multiple devices.
- {2}Desktop - mobile onboarding.
  - The "mobile" journey: Download Firefox → Sign in to sync → Send a tab / bookmark something → Profit!
- Redesign SUMO and/or have the android tour really be a tour [seems like this is about how the support page appeared to an Android user)

# {3}[1] Localization

- Localization, culture-specific
- [.5] Review localisation of first run experience
- [.5] Onboarding that is not western-centric

# {2}[0] Bookmarks

- {2}Make bookmarks easier to understand: Easy to find bookmarks in the menu, If you add a bookmark to the toolbar folder, display the toolbar Bug 1210366
  - Fix the bookmark where-did-it-go problem

# {8}[2] Segments

- [2] Find top 3 actions that retains a user by user type. [moved from Value Prop]
- Personalize experience (user first name, greet)
- Not every new feature is relevant to a user's goals
- {2}Define onboarding flow by major user types
    - Define user-value for various user segments (and what these segments are) (for messaging) [moved from Value Prop]
- (on android) Show me more
- (something that I can't read)

# {12}[1]Sync

- {3}[1] Gmail, Yahoo, Outlook login/signup
    - Test (with an eye on retention) whether using external (???) (such as Yahoo and Gmail) increase account adoption without compromising retention.
- Optimize first run snippets to reinforce user experience
- Account sign-in in the migration step.
- Promote Firefox Accounts in a way that is user centric (not just because we want more sign-up #'s) (clear value proposition)
- Android: top sites / history / bookmarks - customize as part of first run experience
- Consistent naming around sync
- Account verification to exact target. Re-target with a 2nd or 3rd email users who don't verify.
- Auto import data from other browsers
- Allow importing of data from multiple browsers

# {2}[0] Ads

- {2}Killing hijacked ads. (for real!)
    - SEM everywhere