

## Reffell Design Case study: Plaxo first-time experience

*James worked with us to reshape our on-boarding flow at Plaxo to reflect the pivot in the business. His design leadership was instrumental in developing a more effective framework which, in its first phase, saw a 30% increase in our conversion rate. I also found the foundation that he laid during his engagement something that we continued to build upon over the years—compounding the initial ROI.*

– Preston Smalley, Plaxo GM & Head of Product

### **Project summary**

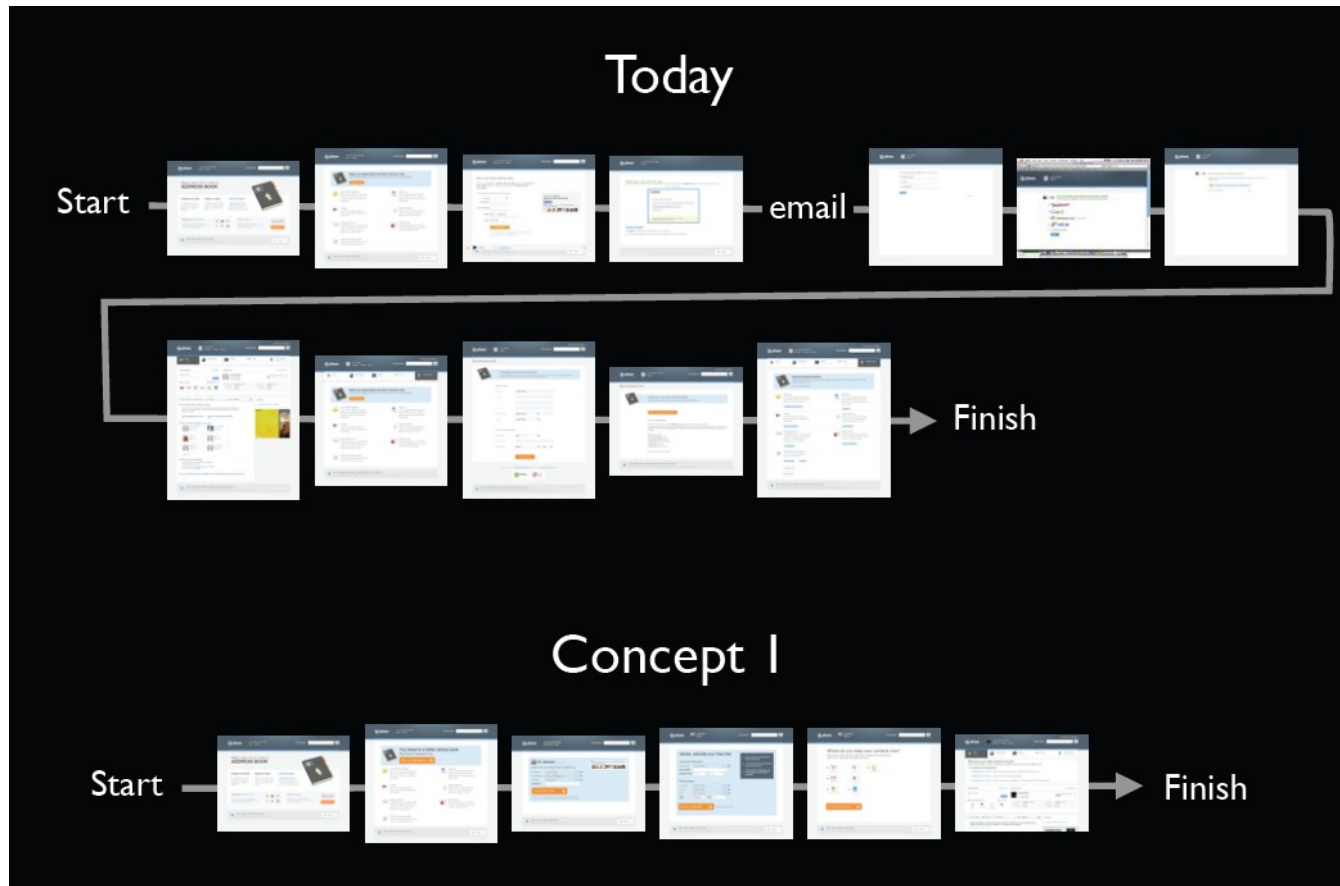
In 2010, Plaxo (plaxo.com) brought me on for a short project to analyze and help redesign their first-time experience.

Plaxo knew that users who imported two or more address books (from Google, Yahoo, mobile phones, etc.) during their first-time experience were considerably more likely to stick around and be active, and even paying, customers. The goal of the redesign was to increase the number of successful signups in general and (more importantly) the number of successful signups with 2 or more imported address books. My role in the project included analyzing the existing experience, creating concept designs for a new experience, and creating flows and mid-fidelity wireframes for key screens.

## Existing flow & concept design

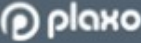

Major issues with the existing flows included:

- length & complexity
- failure to fully communicate the value of a Plaxo account
- lack of emphasis & enjoyment in the importing process
- Failure to explain “what now?” to users who completed signup



The design concepts radically simplified & shortened the flow by removing fields & compressing steps. It promoted the value of address book consolidation and made the importing of address books simple, consistent, and fun through visual cues and game-like attributes.

# Concept screen for import flow

James Ruffell  
Sign outFind Contact

## Import your contacts.

The more contacts you import, the more powerful your new address book.

Enter your Yahoo! credentials: (We won't store your password.)

Email:

Password:

Import Contacts

Cancel

I'm done importing!

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English ▾

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After several iterations the import concept designs had been refined & fleshed out to cover multiple uses cases, as well as the post-signup task of letting the users know what they should do next to get value from the system.

### Final screen example:

**plaxo** James Reffell Messages Settings Sign out Find Contact

## Fill your Plaxo address book.

Import all your address books, contacts, and friends. The more you connect, the more powerful your address book becomes.

- ✓ Gmail last: 8/31/2010 [refresh](#)
- ✓ Yahoo Mail last: 8/31/2010 [refresh](#)
- ✓ Facebook last: 8/31/2010 [refresh](#)
- ✓ Spreadsheets last: 8/31/2010 [refresh](#)
- ✓ AT&T last: 8/31/2010 [refresh](#)

**Next** ▶

**1,234**  
Contacts

Did you know that ...

**415** is the most popular area code in your address book

There are ...

**88** duplicates in your address book. (Plaxo can fix that for you.)

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## What now? screen

Welcome to Plaxo. What would you like to do first? X

**Update & share your contact information**

Make sure everyone that matters has your preferred **email, address, and phone number.**

[Go ▶](#)

**Clean up your address book**

There are **45 possible duplicates** left in your address book. Plaxo can help you clean that up.

[Go ▶](#)

**Add more contacts to your address book**

You can import contacts from **spreadsheets, Outlook, and even your cellphone.**

[Go ▶](#)

[Go to my address book](#)

group containing 38 contacts.

Address Book Manager found 62 duplicate contacts in your address book. [De-Dupe your contacts »](#)

You have 34 contacts with invalid email addresses. [View contacts »](#)

**Recent Activity**

You updated information for 3 contacts via Plaxo Online

Linda V. Schreiner updated her information on Plaxo

August 30th  
Ryan Brewer [Send an eCard](#)

[eCard Home](#) | [Scheduled eCards](#)

**Import Your Contacts**

Build your smart address book by importing contacts

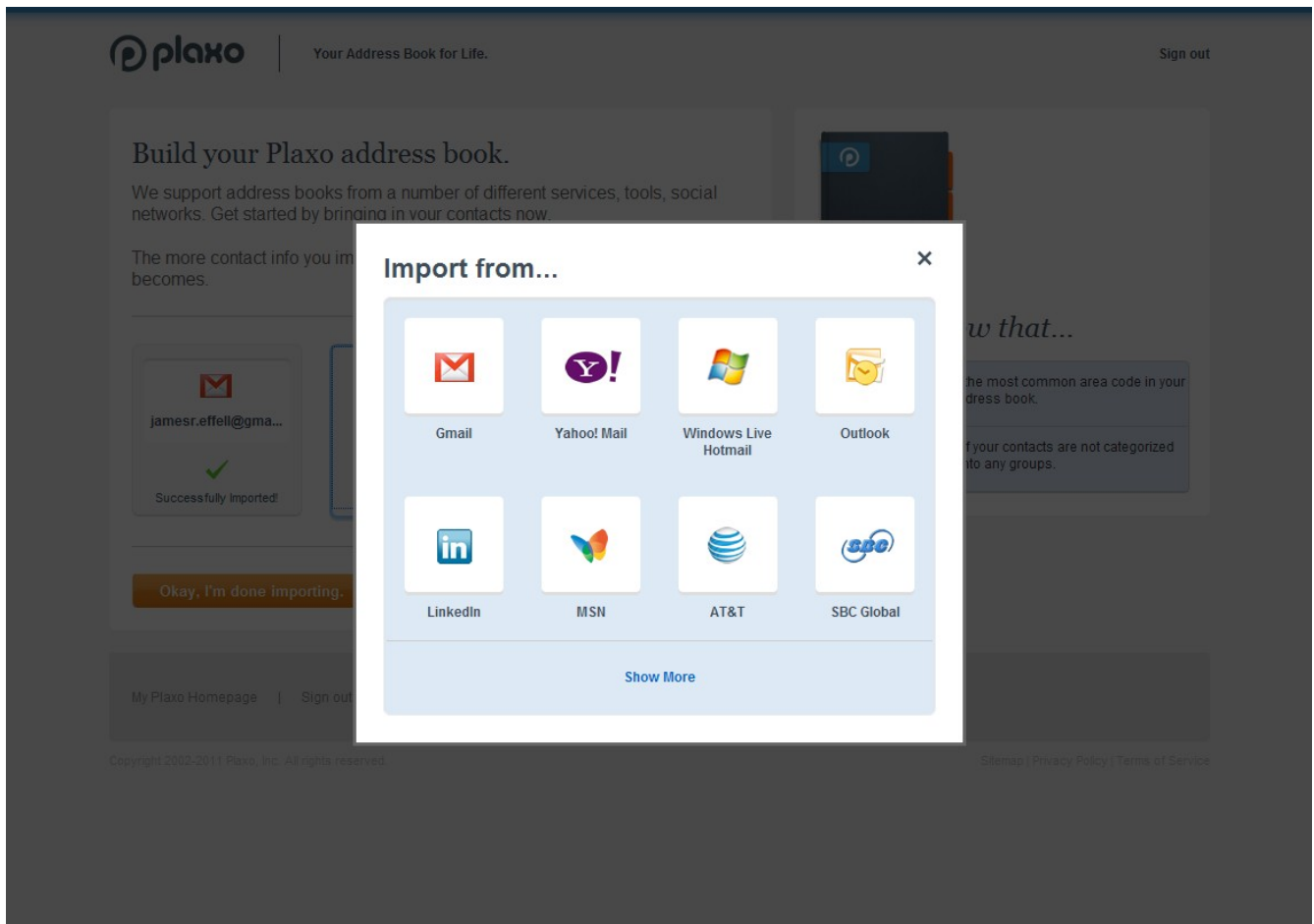
	Last imported on 2/12	<a href="#">Refresh</a>
	Last imported on 2/10	<a href="#">Refresh</a>
	Last imported on 2/3	<a href="#">Refresh</a>

## Launch

The redesigned flow went live a couple months after the project. The design had been further refined from my concepts & wireframes by Plaxo's internal design team. Plaxo reported significant increases in conversion rates (~30%) as a result of the project, and have since continued to further iterate their first-time flows.

The following screenshots were taken from the live site after launch:

### Import layer



# Partially completed import




Your Address Book for Life.

[Sign out](#)


## Build your Plaxo address book.

We support address books from a number of different services, tools, social networks. Get started by bringing in your contacts now.

The more contact info you import, the more valuable your address book becomes.



jamesr.effell@gma...



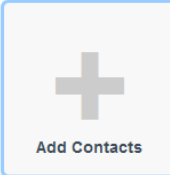
Successfully imported!



greffell@yahoo.co...

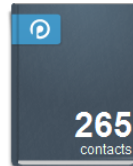


Successfully imported!



Add Contacts

[Okay, I'm done importing.](#)



*Did you know that...*

**94%** of your contact entries are missing a mobile phone number.

**100%** of your contacts are not categorized into any groups.

[My Plaxo Homepage](#) | [Sign out](#)

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