

Building a Simpler, more Personalized Account Setup Experience

Author: Amy Chen

Claps: 73

Date: Jan 17

First impressions matter. Weâ€™ve all heard the saying before, at least when it comes to meeting new people. Well, they can be just as important when it comes to adopting new technologies too. The first interaction that a person has with your software can either be a seamless introduction that primes them to become a loyal user or it can cause confusion and push them away.

At Klaviyo, our Onboarding team is dedicated to creating a great experience for new users. The team is made up of product managers, UX designers, software engineers (like me), and data analysts. Our goal is to equip users with knowledge and tools to get started with Klaviyo as quickly as possible. This includes the very first thing a new user sees, the setup wizard, which is our new account setup process.

A few months ago, our team took a fresh look at our existing setup wizard and made a number of improvements that show just how much first impressions matter. In this post, find out how we diagnosed the problem and built a more personalized setup experience that ultimately got *more* users into the Klaviyo platform, *faster*.

Opportunities for Improvement

The original setup wizard was launched in 2018, with a goal of gathering the information needed to set up an account and equip a user to start using Klaviyo. For example, a new user would submit their email address, company name, website, and phone number through the sign-up form, then proceed through the wizard to provide their mailing address and connect the account to an ecommerce platform (Shopify, BigCommerce, etc.), before gaining access to Klaviyo.

It seems straightforward, but getting this experience right (something that many SaaS platforms deal with) can be challenging. On the one hand, the more information we have about a user, the more customized an experience we can provide, which allows them to get more value out of Klaviyo. On the other hand, each additional piece of information that the user has to fill out can be a deterrent to completing setup â€” people have limited patience and lots of distractions competing for their attention. The original setup wizard, which Iâ€™ll refer to as V1, got the basic job done, but only ~60% of new accounts were completing it within one hour of signing up. Klaviyo was built to empower creators to communicate directly with their customers, but weâ€™re not doing our jobs if a large chunk of sign-ups donâ€™t even make it onto the platform!

As illustrated in Figure A, V1 was composed of 7 steps spread across 5 pages, with one or more actions required of the user per step. Users were spending an average of 4 minutes to complete the setup wizard and we found that users spent the most time on steps that required multiple actions (unsurprising). The Brand Information page, which collected sender name, email, and mailing address data across 8 separate form fields, clocked in with the longest average time spent

of ~1 minute. It turned out that this page was also where users were dropping off the most (~10%).

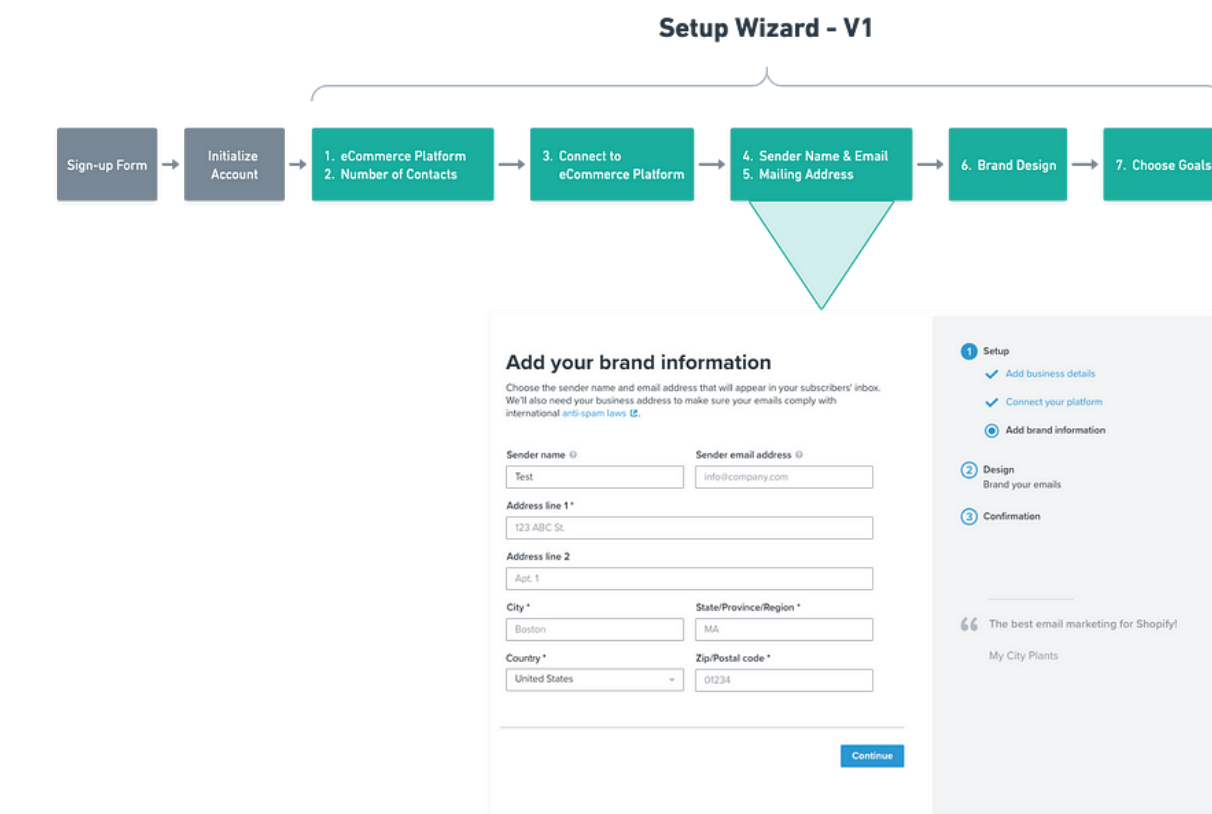


Figure A

Based on this research, we hypothesized that a shorter and simpler setup wizard, which got users into Klaviyo faster, could increase the overall completion rate. We identified 3 main areas for improvement:

1. **Eliminate unnecessary steps** – in the spirit of making Klaviyo as useful as possible for new users, V1 was collecting a lot of information. Was all of it absolutely necessary at this point in the new user setup process?
2. **Look for ways to speed up steps** – for information that *was necessary*, could there be a way to reduce the amount of time spent on each step?
3. **Reduce screen complexity** – there was simply too much going on on each page. From multiple input fields per page to multiple clickable navigation links on the right panel, it was too easy for the user to get distracted.

Our Solution

Once these problem areas were identified, the team set out to develop a solution that would simplify the user experience without compromising in-platform capabilities. Our first step was to try to reduce the number of steps in the flow. We did a full review of the data being collected in each step of V1 and figured out what was absolutely necessary (e.g., email address, company name, mailing address) in order to create a functioning Klaviyo account and what was more of a “nice-to-have” intended to help users take advantage of more Klaviyo features once they were in the platform.

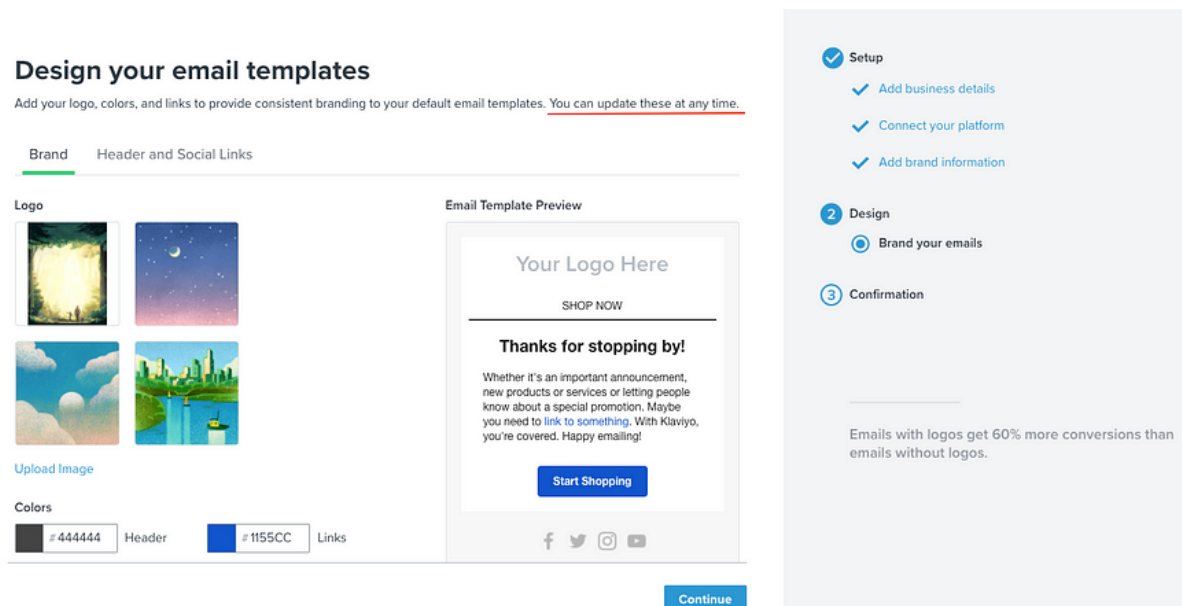


Figure B

An example of the latter is the brand design step (Figure B), which allows the user to configure their email template to use the colors, fonts, and logos associated with their brand. While this is an important step towards sending your first email with Klaviyo, it is not absolutely necessary to complete it prior to entering the platform. In fact, we were already messaging on the page that the design could be modified at a later time (see the underlined text in Figure B). Despite that, many users seemed to get sucked into the step and spend a lot of time trying to perfect their template. In other cases, the person creating the account was not the appropriate person to be configuring branding for the company so this might be an irrelevant setup task. And most users revisited this activity later anyway. So, we removed it from the setup wizard.

On top of reducing the number of steps required, we devised engineering solutions to streamline the collection of data. We inferred data whenever possible and implemented conditional routing throughout the wizard in order to automatically complete steps for users. For example, once the user submits the initial sign-up form, weâ€™re often able to extrapolate what ecommerce platform theyâ€™re using to power their site. In that case, we can skip a step and go directly to a contextualized page for integrating with their ecommerce system. In addition to removing an unnecessary step, it creates a more personalized experience for the user.

We implemented a similar solution to streamline the mailing address step. Submitting a mailing address requires the user to fill out multiple lines of information so any opportunity to skip this step would be a big win in terms of getting users through setup faster (recall that this is the step that users spent the longest amount of time on and dropped off at the highest rates from). Well, it turns out that many existing ecommerce platform users already have a mailing address associated with their account. For example, anyone that integrates with Shopify has granted us access to their contact information so weâ€™re able to extract the mailing address using the Shopify API and automatically populate the data in the Klaviyo account. Instead of a one-size-fits-all setup wizard, now a large number of users are able to skip what was previously the most complicated step of account setup.

Finally, the team designed a clean, minimalist look and feel in order to address the issue of screen complexity. The navigation panel on the right was removed and each page was stripped down to contain just one call to action. These simplifications focus the userâ€™s attention in order to reduce the amount of time spent on each page.

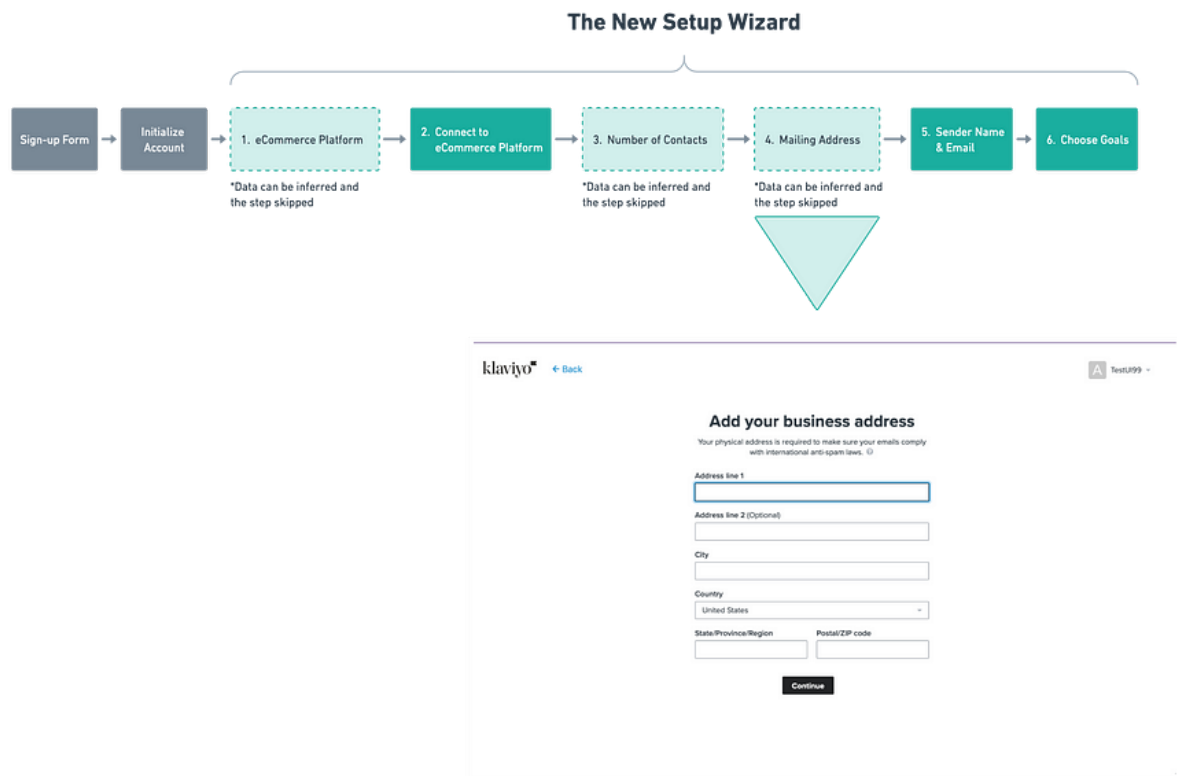


Figure C

As illustrated in Figure C, our new setup wizard was composed of 6 steps across 6 screens. However, notably, 3 of those steps can potentially be inferred or scraped, leading to a more personalized experience and less work for the user.

The Results

How did this new experience perform? Based on A/B testing (a standard Klaviyo practice for measuring the impact of our features), the new wizard:

- Saw **~70% of users completing it** within one hour of signing up (up from 60% in V1)
- Drove a **6 percentage point increase** (from 70% to 76%) in the share of users completing setup within 24 hours
- Drove a **17 percentage point increase** (from 39% to 56%) in the share of users completing setup within 5 minutes

Most importantly, it means more people experiencing the power of Klaviyo for themselves. Not only did more users complete the setup wizard, but we also found that more of them went on to engage with Klaviyo tools. Of those who completed setup, we saw a 2.5 percentage point increase in the share of users going on to create a campaign, form, or flow within 7 days – a great first impression driving real impact!

If you're working on similar challenges or just want to compare notes, feel free to get in touch.