Optimizing monetization and plan selection at scale

Designing confidence at the moment of commitment

ROLE
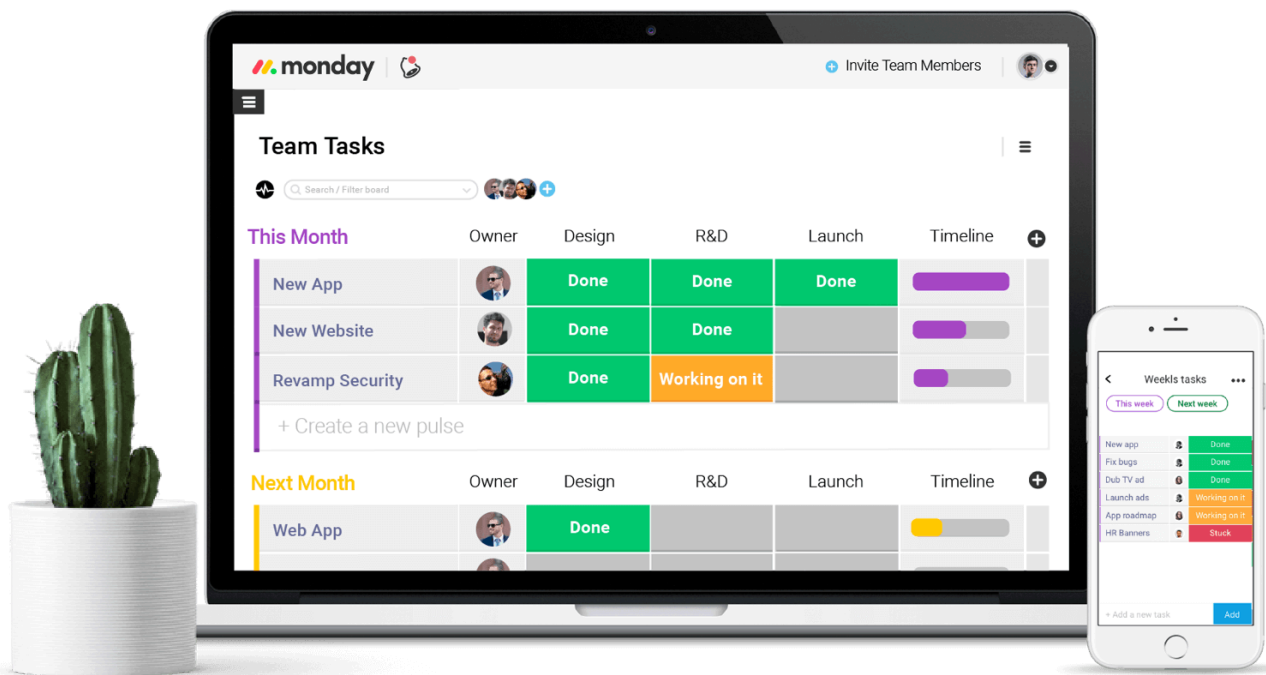
Senior Product Designer

TEAM

Growth Squad (PM · Engineering · Data)

SCOPE

Registration, upgrade, plan selection

IMPACT

+7% reg-to-plan conversion · 35% Pro uplift

CONTEXT

Millions of users completed the trial.

Engagement was strong.

Usage was high.

But when the trial ended, conversion dropped sharply.

The pricing table was clear. The plans were defined. Yet users hesitated.

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>
> *"Each plan supports a different workflow, but comparing them felt overwhelming. I was afraid of choosing the wrong tier."*

This wasn't pricing sensitivity.
It was decision anxiety.

The end of a free trial is not neutral.

It is a moment of commitment under uncertainty.

WHAT WE OBSERVED:

- Sharp drop-off at plan selection
- Repeated hesitation between Standard and Pro
- Users leaving instead of choosing "wrong"
- High engagement during trial, low confidence at upgrade

USERS WEREN'T ASKING:

"Is this worth the money?"

THEY WERE ASKING:

Which plan fits how we actually work?

Am I locking us into the wrong choice?

What if we outgrow this next month?

KEY INSIGHT

Abandonment wasn't rejection – it was avoidance.

When the perceived cost of a wrong decision felt higher than the value of continuing, users left.

MONETIZATION   RECOMMENDATION   EXPERIMENTS

My Ownership

- Led end-to-end design of upgrade and monetization flows

- Designed logic-driven plan recommendation system

- Partnered with Data on behavioral segmentation

- Translated usage patterns into recommendation signals

- Ran controlled A/B experiments within the growth squad

- Designed contextual feature promotion surfaces

Users didn't struggle with pricing.

They struggled with choosing the right plan.

Good monetization UX doesn't push users to pay. It removes the fear of saying yes.

HYPOTHESIS-DRIVEN DESIGN

H1   **If users see a plan recommendation based on their own activity, they feel more confident selecting a plan.**

Instead of forcing self-diagnosis, we analyzed trial usage and surfaced: "Recommended for you - based on your activity."

- Anchors decision in personal data
- Reduces cognitive load
- Shifts product from seller → advisor

H2   **If users can visually compare how their usage maps to each plan, they better understand value differences.**

WE INTRODUCED

- Usage breakdown (Boards, Views, Dashboards, Workload)
- Color-coded alignment indicators
- Clear visibility of plan gaps

RESULT

Fewer accidental under-selections and reduced downgrade regret.

H3 If recommended plans highlight outcomes - not just features - users perceive higher value and convert faster.

INSTEAD OF LISTING FEATURES, WE FRAMED BENEFITS

(Team visibility)　(Capacity planning)　(Workflow scalability)

Upgrade felt like continuation - not escalation.

THE APPROACH

Four connected improvements

01 **Reframe Plan Comparison**

Shift from abstract feature tables to use-case-driven clarity: how your team actually works.

02 **Personalized Plan Recommendations**

A logic-driven system analyzed real usage signals and surfaced recommended tier, usage justification, and visible alignment gaps. Decision support replaced guesswork.

03 **Simplify the Commitment Moment**

Reduced redundant comparison loops, overwhelming feature density, and clarified reversibility. Lower the risk of choosing - not the price.

04 **A/B Testing Value Framing**

Tested two upgrade experiences to validate that evidence-based messaging outperforms generic copy.

A/B Test: Pro Recommendation

We tested two upgrade experiences to validate evidence-based messaging.

Variant A

Recommendation + Feature explanation + "Why" banner

Mental model: "Trust us – Pro is better for you."

Variant B

Recommendation + Usage proof + Recommendation

Mental model: "Here's evidence – Pro fits how you work."

We recommend the Pro plan for your work

Standard plan

✓ Mainly use board views

✓ Don't need dashboards or workload tracking

🔒 Only 3 dashboards included

🔒 No access to workload tracking

Continue with Standard

Recommended for you

Pro plan

✓ You used Dashboards and Workload views

✓ These features unlock team visibility and capacity planning
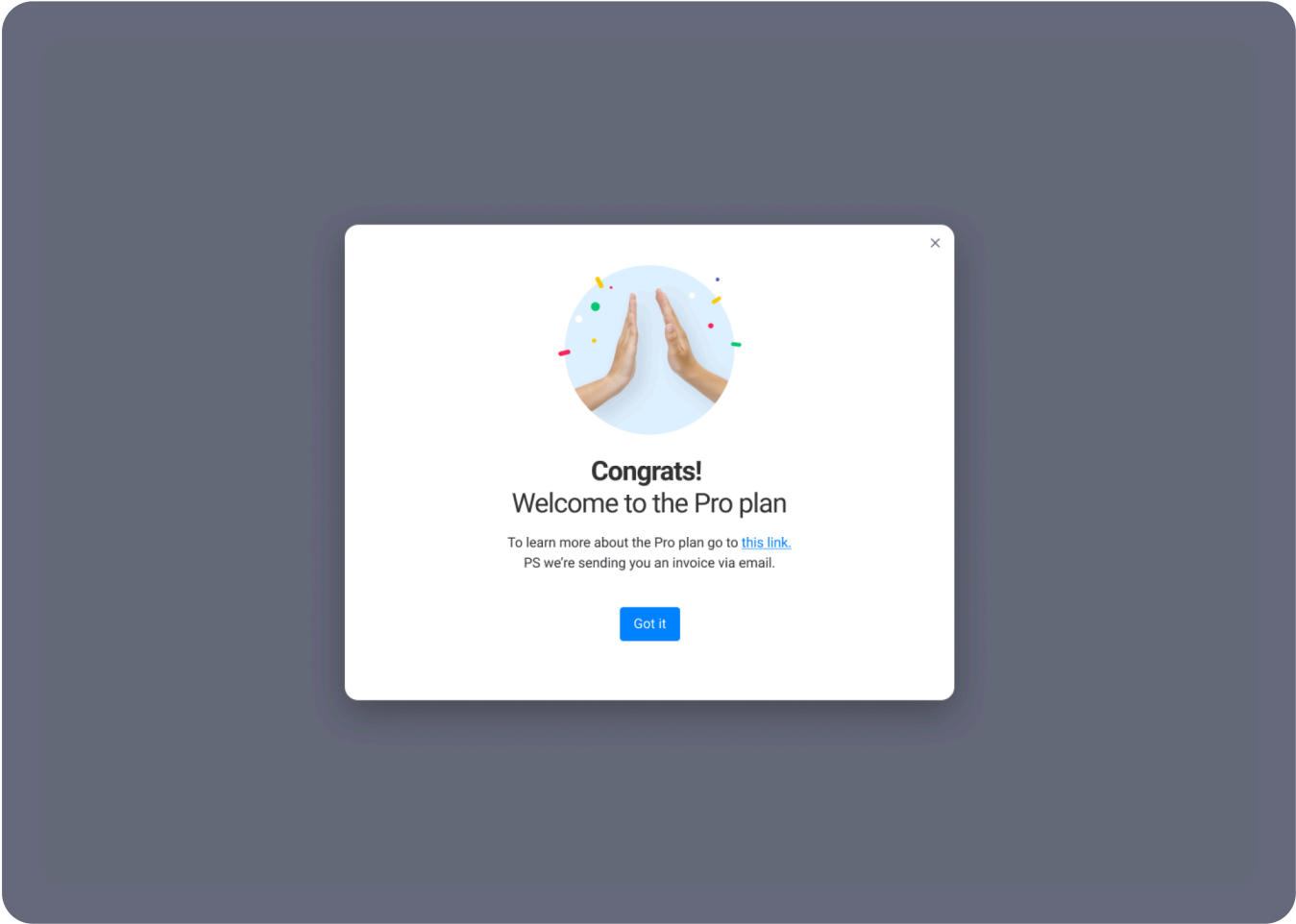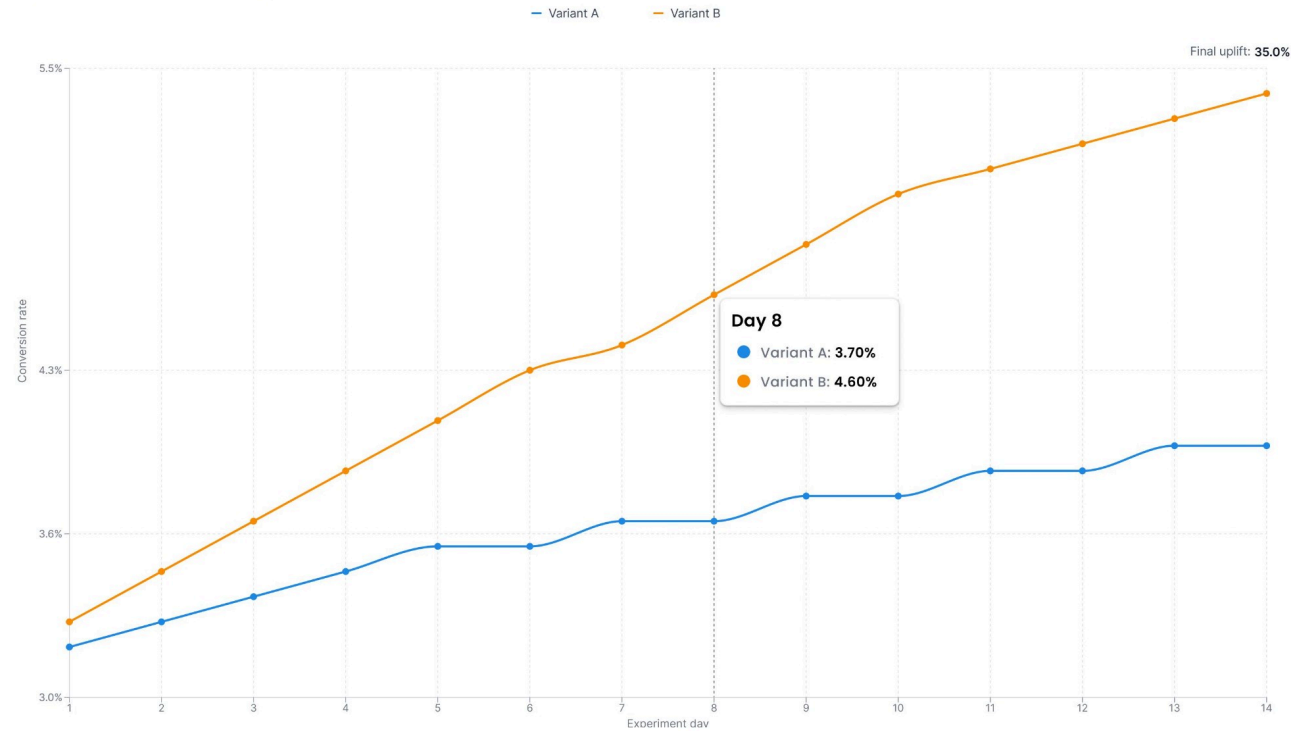
✓ Unlimited dashboards

✓ Workload tracking & planning

Continue with Pro

Why this matters

You're already working across multiple views. Pro brings everything together with unlimited dashboards and workload planning — helping you track progress faster and run work more efficiently.

See all plans

Continue with Pro

Based on your activity during the trial.

We recommend the Pro plan for your work

Your usage at a glance

Board views		82	Standard
Advanced views		40	Partial
Dashboards & workload		60	Pro
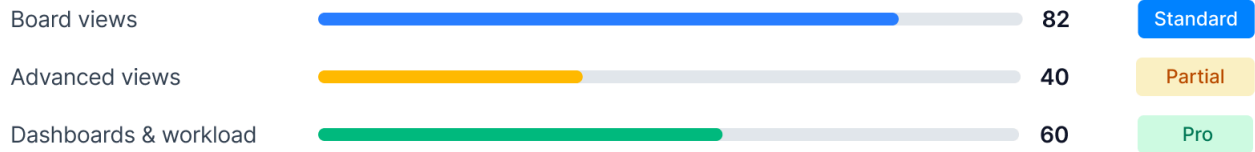
View all activity

Standard plan

✓ Mainly use board views

✓ Don't need dashboards or workload tracking

Continue with Standard

Why standard?

Recommended for you

Pro plan

✓ You used Dashboards and Workload views

✓ These features unlock team visibility and capacity planning

✓ Unlimited dashboards

✓ Workload tracking & planning

Continue with Pro

Why Pro?

Usage-Driven Recommendations Increased Pro Conversions by 35%

We tested two upgrade experiences - a generic recommendation vs. a usage-based personalized recommendation - to measure impact on Pro conversion. The usage-driven experience increased conversion from 4.0% to 5.4%, delivering a 35% relative uplift and higher user trust in the upgrade recommendation.

A/B Test Conversion Trend

Variant A vs Variant B - daily cumulative conversion rate

— Variant A   — Variant B

Final uplift: **35.0%**

Conversion rate

Day 8
● Variant A: **3.70%**
● Variant B: **4.60%**

5.5%

4.3%

3.6%

3.0%

1   2   3   4   5   6   7   8   9   10   11   12   13   14

Experiment day

Congrats!
Welcome to the Pro plan

To learn more about the Pro plan go to this link.
PS we're sending you an invoice via email.

Got it

VALIDATION

- Conversion: 4.0% → 5.4%

- 35% relative uplift in Pro upgrades
- Stronger cumulative daily conversion trend

> *Evidence builds confidence. Confidence drives commitment.*

Visual Guidance for Plan Selection

Short explainer videos turn abstract feature lists into real usage stories, helping users quickly understand which plan fits them best.

Choose the right plan for your team

Thank you for choosing monday.com! you have 2 days left on your free trial

Choose team size   5 seats

Yearly **Save 18%** | Monthly

Basic

$8 seat/ month

Total $23 / month
Billed annually

Basic Includes:

Unlimited boards

200+ templates

Over 20 column types

Unlimited free viewers

iOS and Android apps

Create a dashboard based on 1 board

Standard   `Most Popular`

$10 seat/ month

Total $29 / month
Billed annually

▶ Why standart?

All Basic, plus:

Timeline & Gantt views

Calendar view

Guest access

250 automated actions per month

250 integrations per month

Create a dashboard that combines 3 boards

Pro

$16 seat/ month

Total $47 / month
Billed annually

▶ Why Pro?

All Standard, plus:

Private boards

Charts view

Time tracking

Formula column

25,000 automated actions per month

25,000 integrations per month

Create a dashboard that combines 10 boards

Enterprise

All Pro, plus:

Enterprise-scale Automations & Integrations

Enterprise-grade security & governance

Advanced reporting & analytics

Multi-level permissions

Tailored onboarding

Premium support

Create a dashboard that combines 50 boards

Questions

?

★ ★ ★ **30 Days** ★ ★ ★
Money Back Guarantee

Verified by **VISA**

MasterCard SecureCode

Norton SECURED

McAfee SECURE

🔒 SSL Encrypted

Continue

Promoting Discovery Through Value
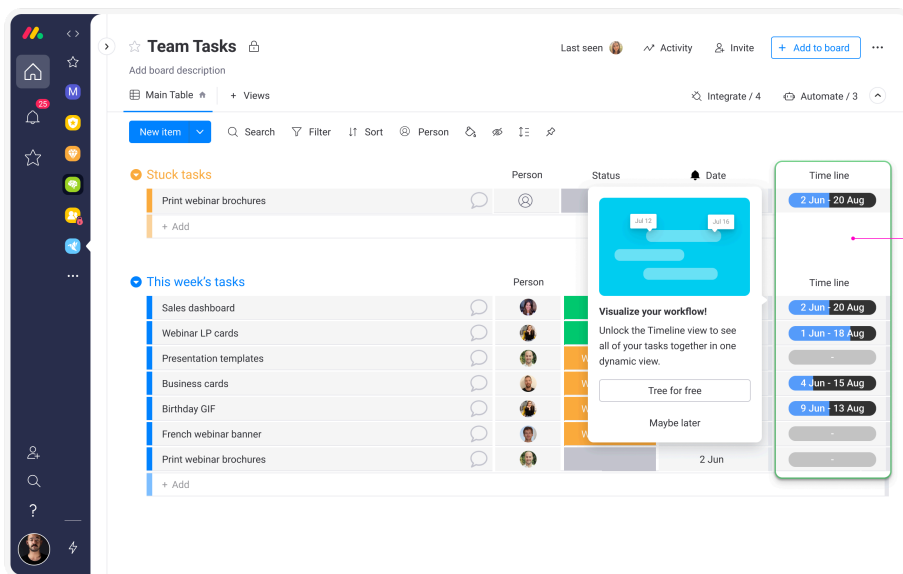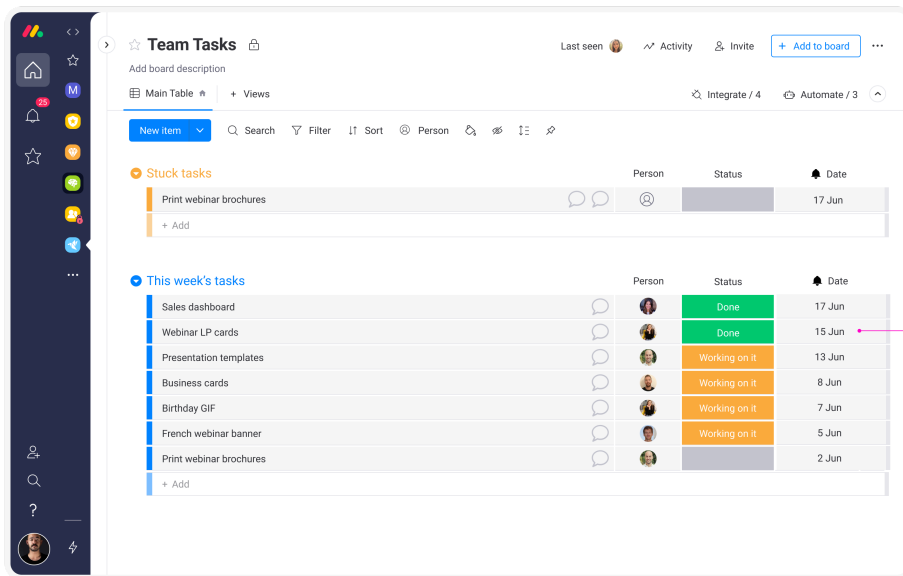
Instead of gating features behind friction, we surfaced premium capabilities contextually.

Timeline   →   show capacity planning

Automation   →   show workflow scale

Advanced views   →   show operational clarity

This reframed locked features from restriction → opportunity. The upgrade became a natural next step.

1. Calendar usage

Users rely on the calendar to understand how their time is actually spent – seeing workload, deadlines, and commitments in one place helps them plan with confidence and avoid surprises.

2. Timeline feature promotion

By visually showing the full flow of work, the Timeline lets users actually see overlaps, dependencies, and gaps – making it easier to understand their schedule and take action with confidence.

R E S U L T S

Measurable impact across the funnel

+7%

registration-to-plan conversion

35%

relative uplift in Pro upgrades

Increased plan clarity and decision speed

Reduced downgrade regret

Higher long-term plan alignment

Most importantly: Users stopped hovering. They started choosing.

Feature comparison under pressure → Guided, usage-driven decision confidence

The moment of commitment became safer.

And when choosing feels safe – growth follows.