

Philip Wong

Product Designer

About me

Navigate through ambiguity

Uncover the “why”

Built 0 → 1 for B2B & B2C

Deliver meaningful impact

Based in Vancouver, Canada

Recent experience

Grammarly

2022-Dec 2024

Senior Product Designer

Demonstrated the impact of Grammarly's AI writing tools on enterprise accounts, scaling seat expansion volume by 10x from tens to hundreds.

Clio

2016-2022

Staff Product Designer, 2021 – 2022

Led iterative improvements to Clio's payment platform, increasing active payment accounts by 260% over three years.

Best Buy Canada

2011-2016

Visual Design Lead, 2015 – 2016

Designed a seamless online shopping experience for Best Buy Canada's peak events, driving \$70M+ CAD in revenue.

Case studies

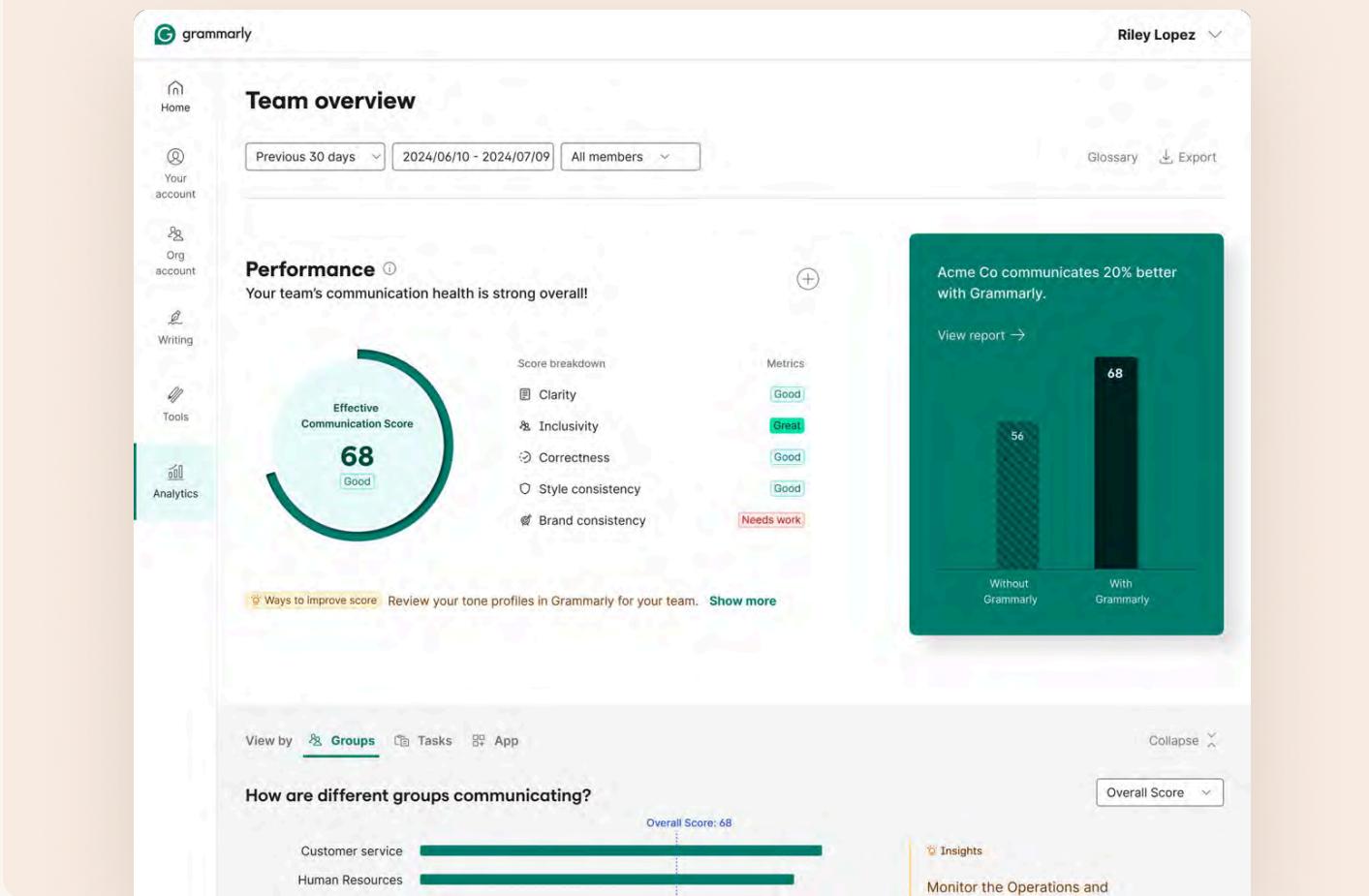
10x Grammarly customers' expansion deal size

Strategic planning

B2B

Visioning

Growth

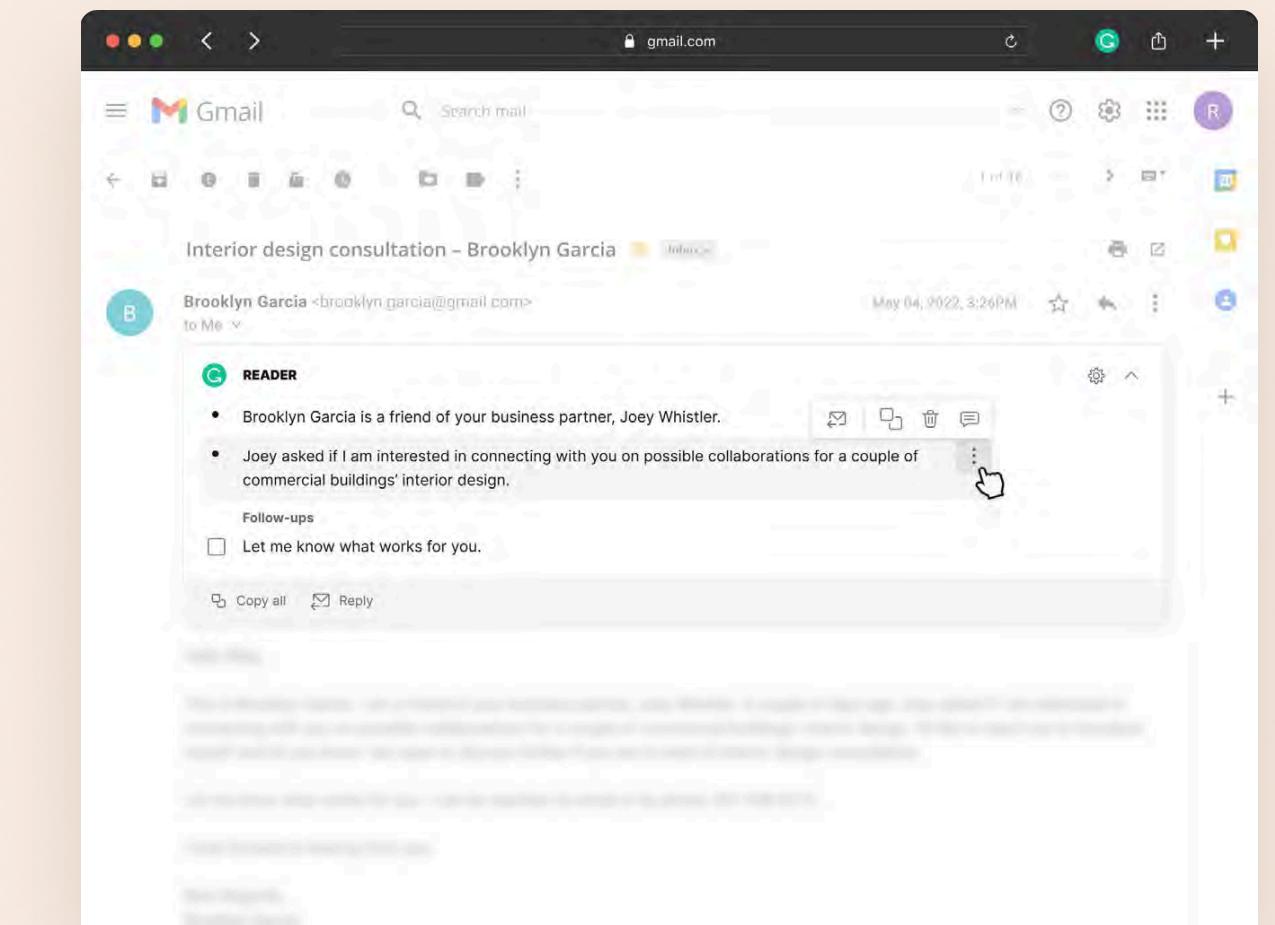


Expand Grammarly beyond writing with email summarization

Generative AI

0 → 1

B2C



Improve the Clio Payments activation experience

Growth

Redesign

B2C

The screenshot shows the 'About the firm (Step 1 of 4)' form. It includes fields for 'Business name' (The Koalaws), 'Federal tax ID' (No hyphens), 'Business structure' (Sole Proprietor), 'Years in business' (Insert 1 if the firm has been in business for less than a year), 'Business address' (7892 Hartmann Canyon Lowerview), 'City' (San Diego), 'State' (California), 'Zip code' (30081), and 'Business phone number' (6195550145).

Case study 2

10x Grammarly customers' expansion deal size

Strategic planning B2B Vision Growth

Enterprise expansion rate is at 7%, falling short of the 15% company OKR target.

Highlights

0 → 1

Launched an evaluation system to assess organizational communication

10x

Seat expansion deal size

Context

Grammarly is shifting from B2C to B2B, prioritizing enterprise expansion. Unlocking what drives growth is key to accelerating revenue and leading in organizational communication

The problem

Enterprise customers aren't expanding.
What's limiting their growth?

Discovery

I led research into the enterprise renewal and expansion journey to uncover key pain points behind low expansion rates

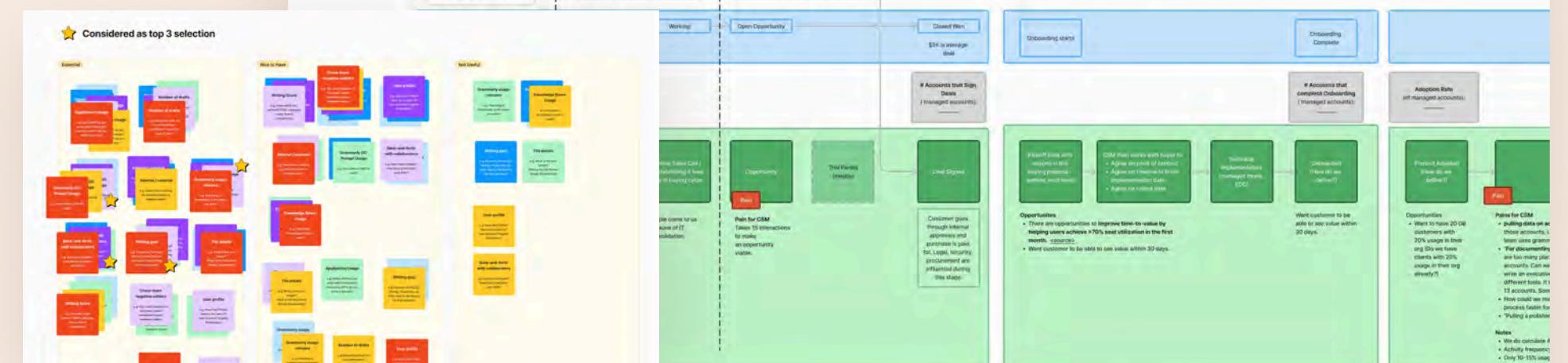
Participants

5
Account
representatives

6
Customer
managers

2
Sales
engineers

20+
Customer
calls



Insights

Pain points discovered

Internal tooling inefficiency

Streamline sales teams' processes for expansion meetings

Lack of insights into value

Provide better data to help buyers understand Grammarly's ROI

High unused seats & features

Increase buyer awareness to drive adoption and engagement

Set direction

Based on our findings, we **focused on solving the lack of insights**, equipping buyers and our sales team with data to show Grammarly's expansion value

Our vision

Empower organizations with actionable insights to improve communication

Strategic approach

Set the team's direction, consult with my PM and EM to prioritize focus areas to ensure clarity on what we're tackling and why, aligning our efforts with the broader vision

12 months plan

Short-term

Provide more granular information on Grammarly's usage pattern



Mid-term

Illustrate progress made on communication using Grammarly



Long-term

Offer insights and recommendations beyond writing improvements



Vision & Impact

Empower organizations with actionable insights to improve communication

More enterprise expansion with bigger deal size

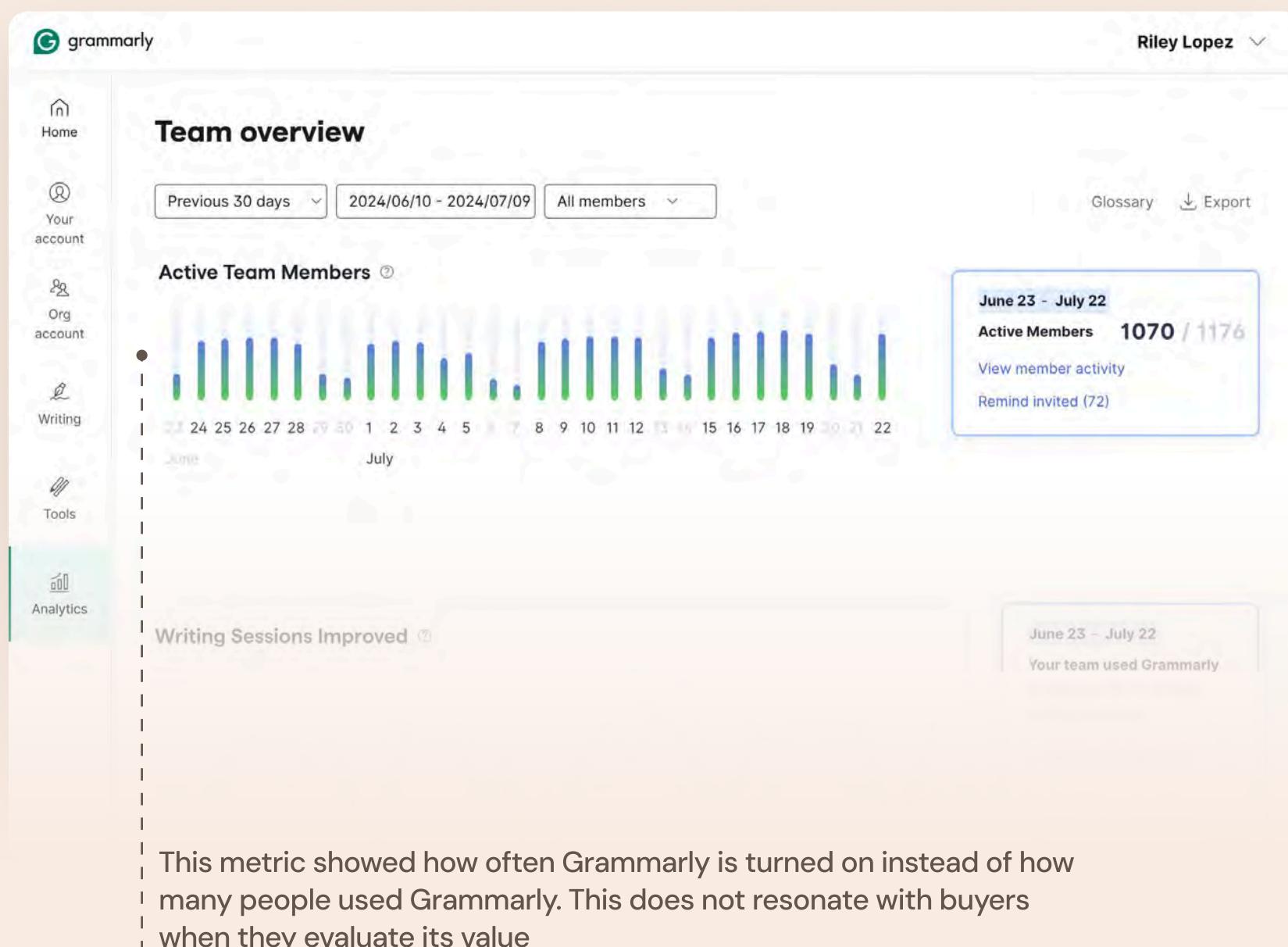
Short-term

Released

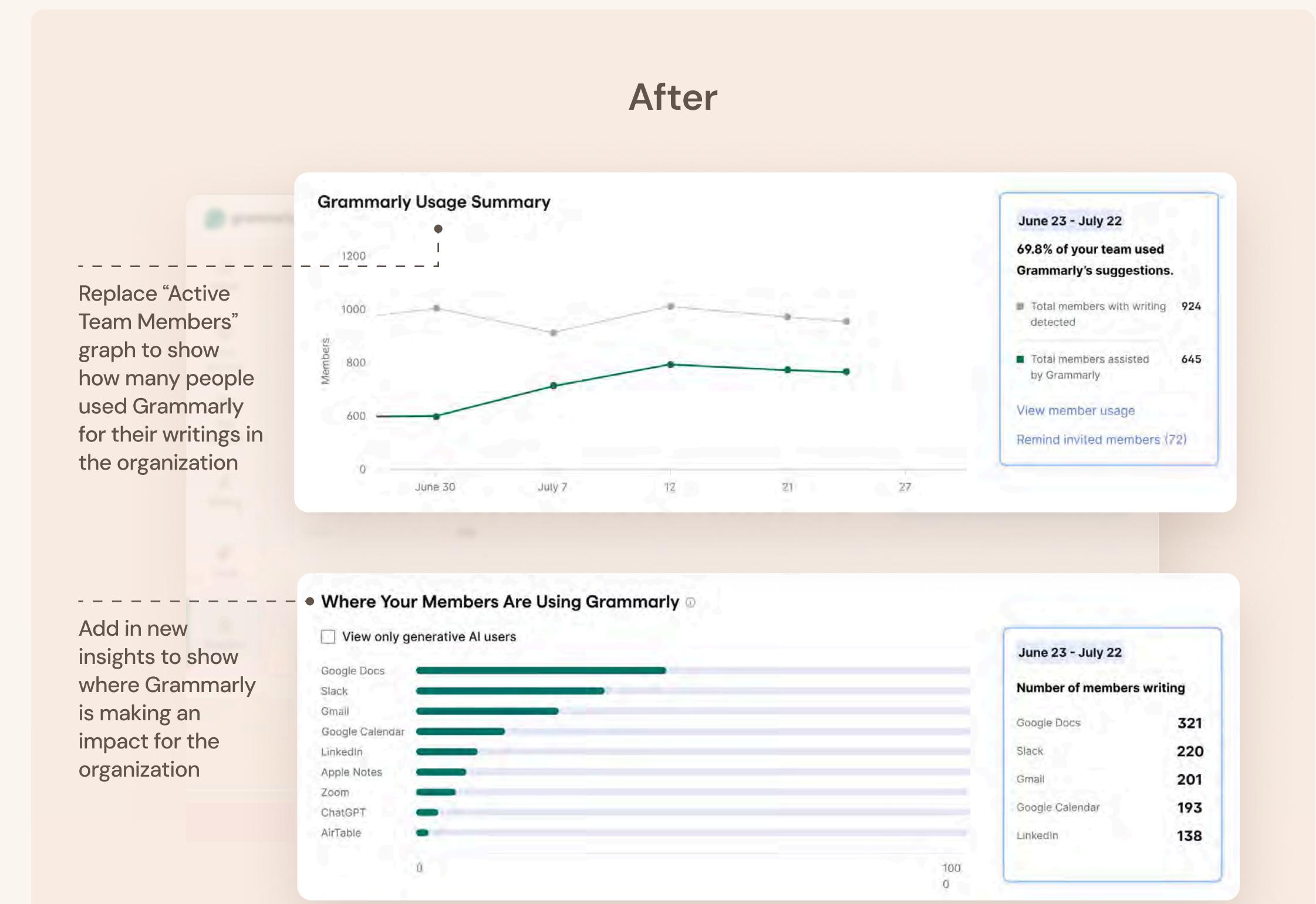
Enhance usage insights

Show Grammarly adoption by highlighting **where it's used** and **how many users are improving their writing**, demonstrating deep workflow integration.

Before



After



Mid-term

Early access

Benchmarking program

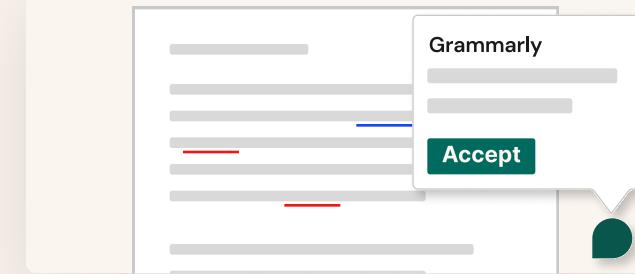
Research showed buyers want to see progress over time. To support this, we launched a benchmarking program during the trial period to **compare communication performance with and without Grammarly**, creating a baseline to demonstrate value and drive expansion

Benchmarking process

Buyers select participants

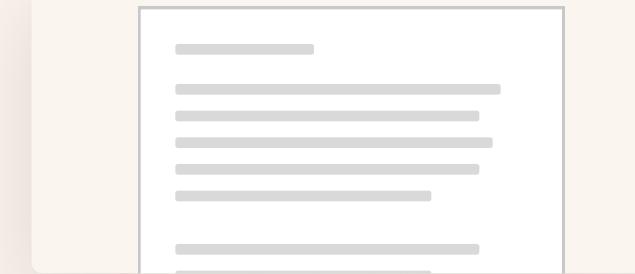


Run Grammarly normally



Show and track writing errors and accepted changes

Run Grammarly in background



Track writing errors without showing suggestions

Measure baseline communication metrics:
errors, clarity, text volume

Mid-term

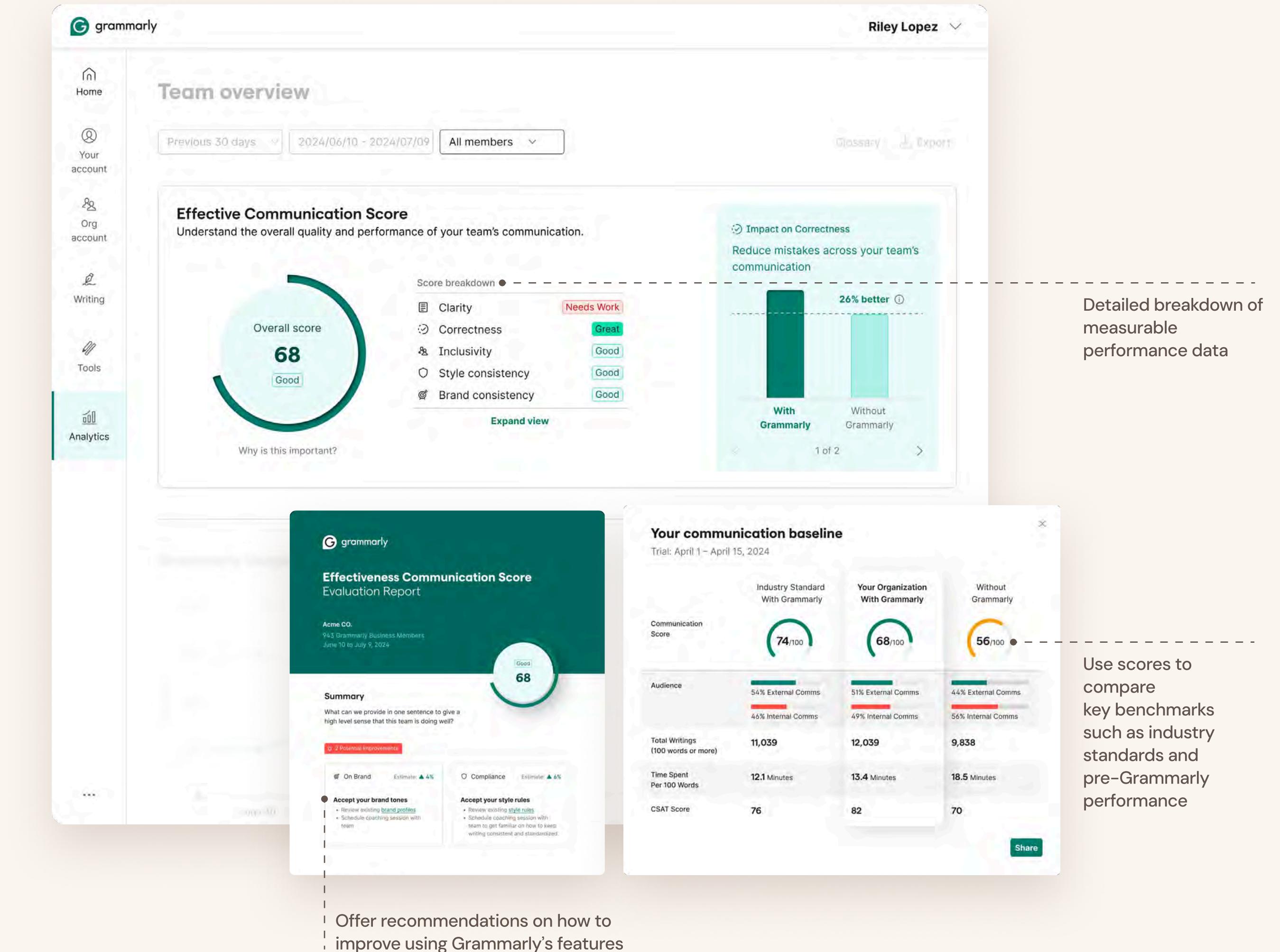
Early access

Effective Communication Score

We had many communication metrics (errors, clarity, text volume, and more), but they were too complex for buyers to interpret.

To simplify, we partnered with data scientists to **create a single score that highlights impact and enables industry comparisons.**

It also guides feature recommendations to close gaps and demonstrate Grammarly's value.



Mid-term

Early access

Impact

After completing our benchmarking and communication score, we launched it with select enterprise customers to evaluate impact

Results from selected customers

10x

5K+



Usage

DailyPay

Increased their seat count during renewal talks from 40 seats to 400 seats

United Wholesale Mortgage

Deploying Grammarly to the entire organization from 4K seats to 9K seats

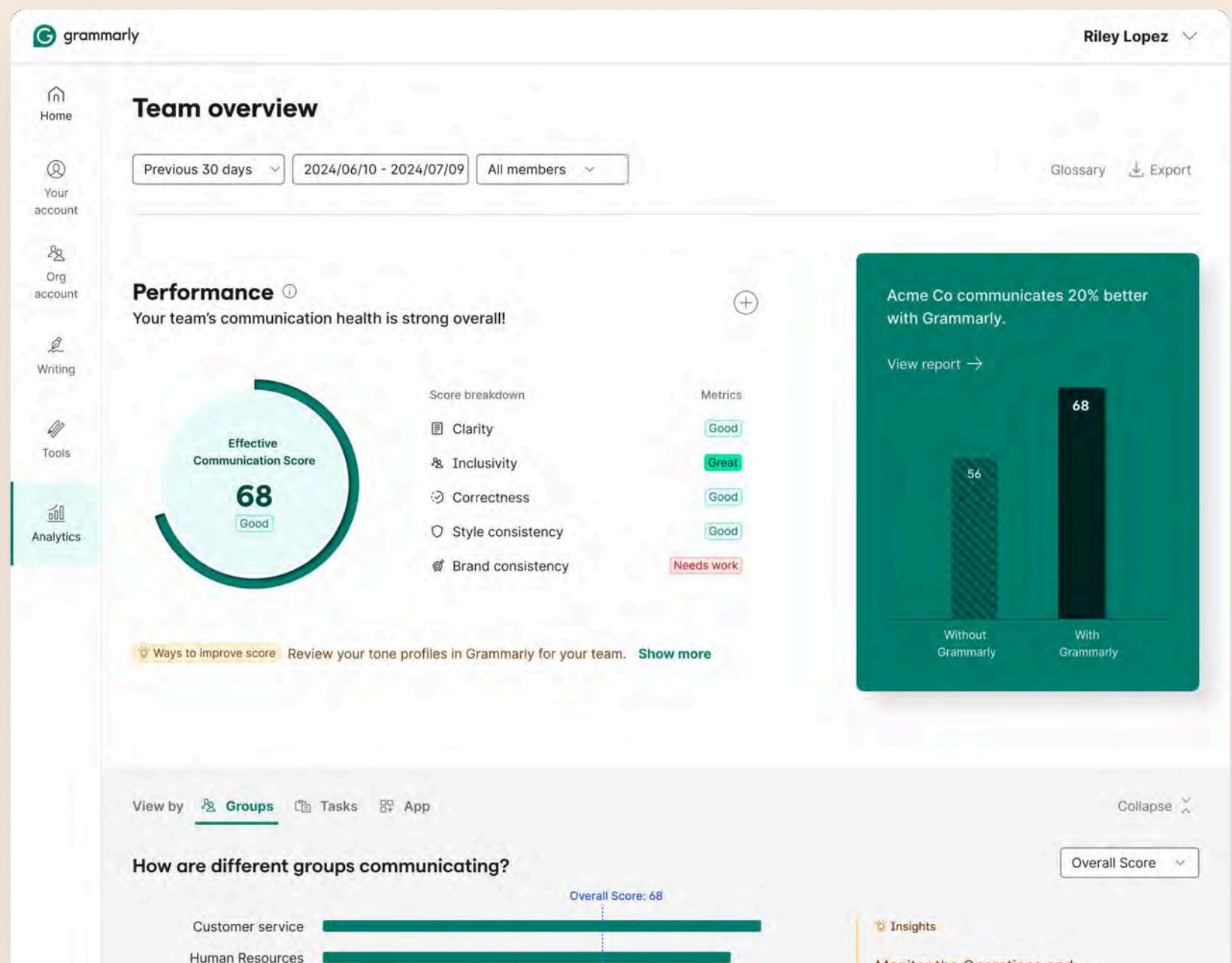
Teleperformance Columbia

A low Effective Communication Score encouraged them to increase feature usage

Next step

New platform

Define requirements for a new platform to centralize enterprise data, enrich insights, and improve visibility as we have more data



Quantify our pitch

Provide clarity for buyers on Grammarly's value towards their key tasks when it's time for expansion

Today

Renewal conversation
with buyers

Future

Renewal conversation
with buyers

Grammarly
improved 78.7%
of your team's
writing sessions.

Grammarly
improved
74 support tickets
with a score of 85.

Case study

Expand Grammarly beyond writing with email summarization

Generative AI O → 1 B2C

Grammarly excelled at writing support but lacked reading comprehension features. We explored how AI summarization could bridge that gap.

Highlights

20.4% +8.0 from 12.4%
Adoption rate overall

8.5% +5.3 from 3.2%
Adoption rate within a day of release

Context

We chose email as the first platform to test AI summarization because

- Most accessible for data to train our AI summarization model
- Less biased output compared to news articles and blog posts

The problem

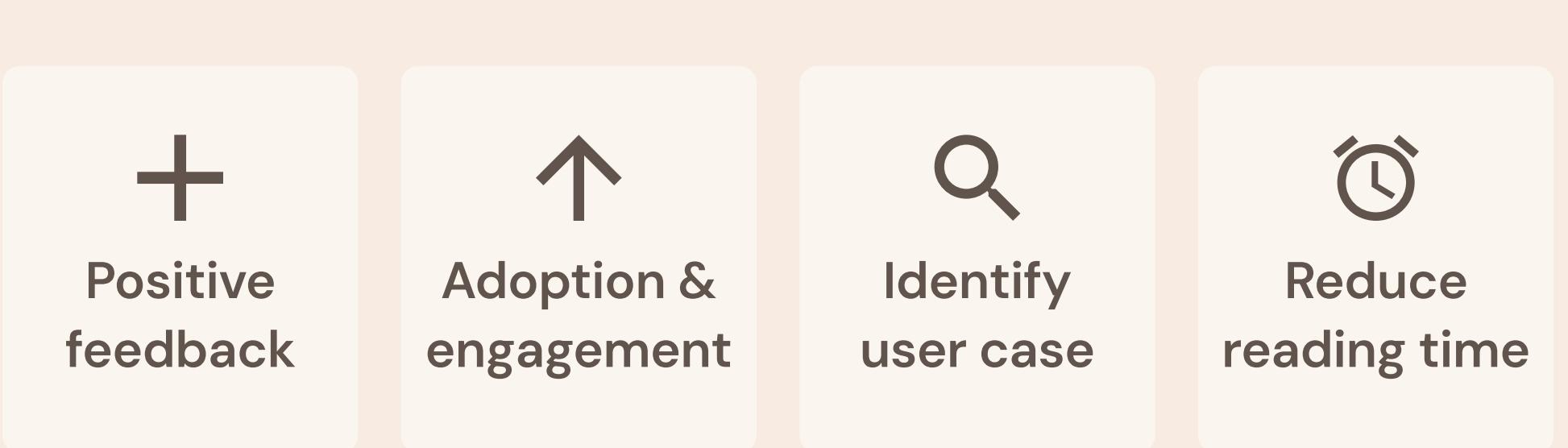
- What is the product-market fit for email summarization?
- What value can we offer if we address both writing and comprehension?

Hypothesis

We defined key outcomes to evaluate the experiment's success

1. Help users read faster and comprehend key content
2. Reduce email-related stress
3. Improve clarity in writing responses

These outcomes will be evaluated by



Grammarly Reader

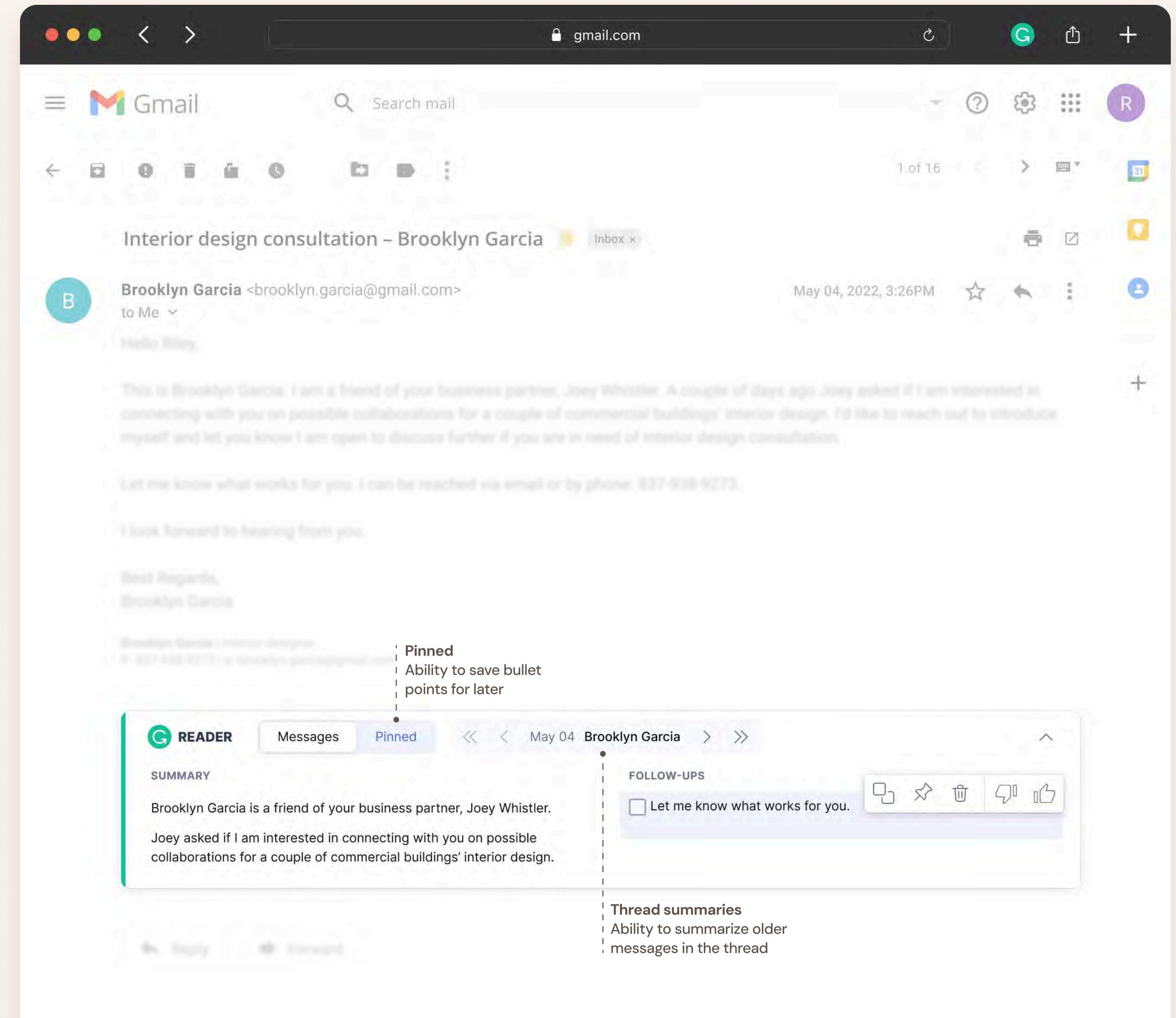
We ran our first experiment with this email assistant that summarizes key information for users to read faster

Format

Chrome extension

Experiment

1% of paid customers
Individual accounts



Discovery

I conducted over 40 user interviews to understand how users perceive the value of Grammarly Reader and how that integrated with their daily workflow

Methods

5

Research plans

40+

User interviews

2

Surveys

Initial experiment's performance

12.4% Adoption rate overall

3.2% Adoption rate within a day of release

0.2% Engagement rate
Emails with Reader interacted at least once

Insights

We identified key issues limiting success: **low visibility, trust concerns, and a bloated user experience.** Additionally, the quality of our generated summaries is not meeting our users' expectations. Addressing these issues was essential to validating product-market fit

User pain points

Placement of Reader

Difficult to notice, low adoption

Privacy concern

How will the user's data be used?

Unused features

Users were not using the "Pinned items" and "Thread summary"

AI-generated content concerns

Summarized irrelevant email

e.g., notification, marketing emails

Summarized the wrong content

e.g., Pleasantries included, duplicated content

Lacked critical information

e.g., Dates, phone numbers

What we did

Boost Visibility

Streamlined messaging above the fold to clearly indicate email summarization before reading, reducing visual distractions

Before

discuss further if you are in need of interior design consultation.

Let me know what works for you. I can be reached via email or by phone: 837-938-9273.

I look forward to hearing from you.

Best Regards,
Brooklyn Garcia

Brooklyn Garcia | Interior designer
P: 837-938-9273 | e: brooklyn.garcia@gmail.com

NEW

Introducing email reader BETA

Grammarly can now summarize key points to help you respond faster.

Try it out No, thanks

Grammarly collects data from your emails to power recaps. Learn how your information is used and protected in our [data collection policy](#).

After

Interior design consultation – Brooklyn Garcia

Brooklyn Garcia <brooklyn.garcia@gmail.com>
to Me

May 04, 2022, 3:26PM

Hello Riley.

Grammarly can now summarize key points for you! **Try it out**

Repositioned and simplified to call out summarization before reading the email

What we did

Build trust

Introduced a review and consent step to help users quickly understand how their data would be used while benefiting from Grammarly

Before

A screenshot of the Grammarly interface. A modal window titled "Introducing email reader (BETA)" is displayed. It contains text: "Grammarly can now summarize key points to help you respond faster." Below this is a "Try it out" button with the option "No, thanks". At the bottom, there is a note: "Grammarly collects data from your emails to power recaps. Learn how your information is used and protected in our [data collection policy](#)." A downward arrow indicates the flow from this screen to the next.

Launch Reader

A screenshot of the Grammarly interface showing the "Launch Reader" screen. It displays a message from Brooklyn Garcia: "Brooklyn Garcia is a friend of your business partner, Joey Whistler. Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design." Below the message, there is a checkbox labeled "Let me know what works for you." A downward arrow indicates the flow from this screen to the next.

After

Built trust with a clear, upfront consent prompt

A screenshot of the Grammarly interface showing a modal window. The title is "Grammarly can now summarize key points for you!" with a "Try it out" button. Below the title, there is a large downward arrow pointing to the "Show a review modal" section.

Show a review modal

A screenshot of the Grammarly interface showing a detailed review and consent modal. The title is "grammarly". It includes sections for "Email Reader" (described as "Spend less time in your inbox with email summarization") and "Identify takeaways" (described as "Turn message into quick summary with action items to share with others"). It also includes sections for "Always in control" (described as "You can turn off email reader any time") and "Reassure users they can opt out at any time". To the right, there is a dashed line with the text "Explain specific data to collect". A downward arrow indicates the flow from this screen to the final "Launch Reader" screen.

Launch Reader

What we did

Reduce complexity

Data showed **86% of emails were read only once**. Based on this, I removed low usage features to focus on delivering value during the first read, the most critical moment for evaluating product-market fit

Before

The screenshot shows the 'READER' interface. At the top, there's a navigation bar with 'Messages' and 'Pinned'. Below it is a 'SUMMARY' section containing text about Brooklyn Garcia being a friend of the user's business partner. To the right is a 'FOLLOW-UPS' section with a checkbox labeled 'Let me know what works for you.' At the bottom is a 'Thread summaries' section with a note about summarizing older messages.

Pinned
Ability to save bullet points for later

SUMMARY
Brooklyn Garcia is a friend of your business partner, Joey Whistler.
Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design.

FOLLOW-UPS
 Let me know what works for you.

Thread summaries
Ability to summarize older messages in the thread

After

The screenshot shows the 'READER' interface after simplification. It includes a summary of the message content, a 'Follow-ups' section with a checkbox, and standard reply and copy-all buttons at the bottom. A note at the bottom indicates the introduction of a whole summary copying feature.

Removed low-use features, simplify layout

READER

- Brooklyn Garcia is a friend of your business partner, Joey Whistler.
- Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design.

Follow-ups
 Let me know what works for you.

Copy all Reply

Introduced ability for users to copy the whole summary

What we did

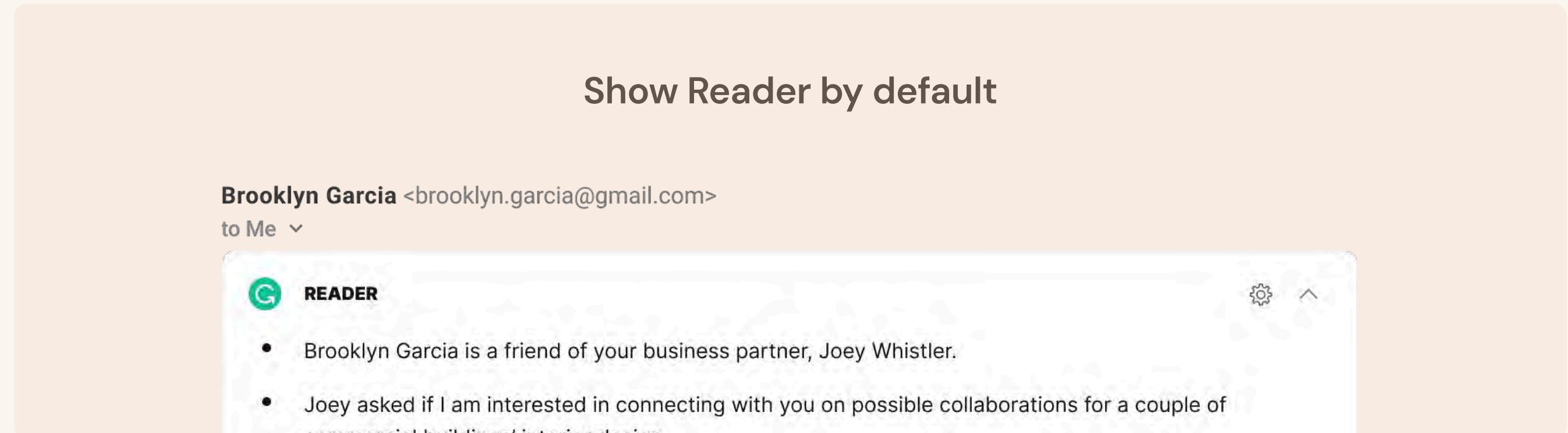
Design around limitations

With limited ML support, I collaborated with FE engineers to conditionally show summaries only when:

- The email was sent by a human
- The email was long in length

This created a perception of higher quality while buying time for future ML improvements

Show Reader by default

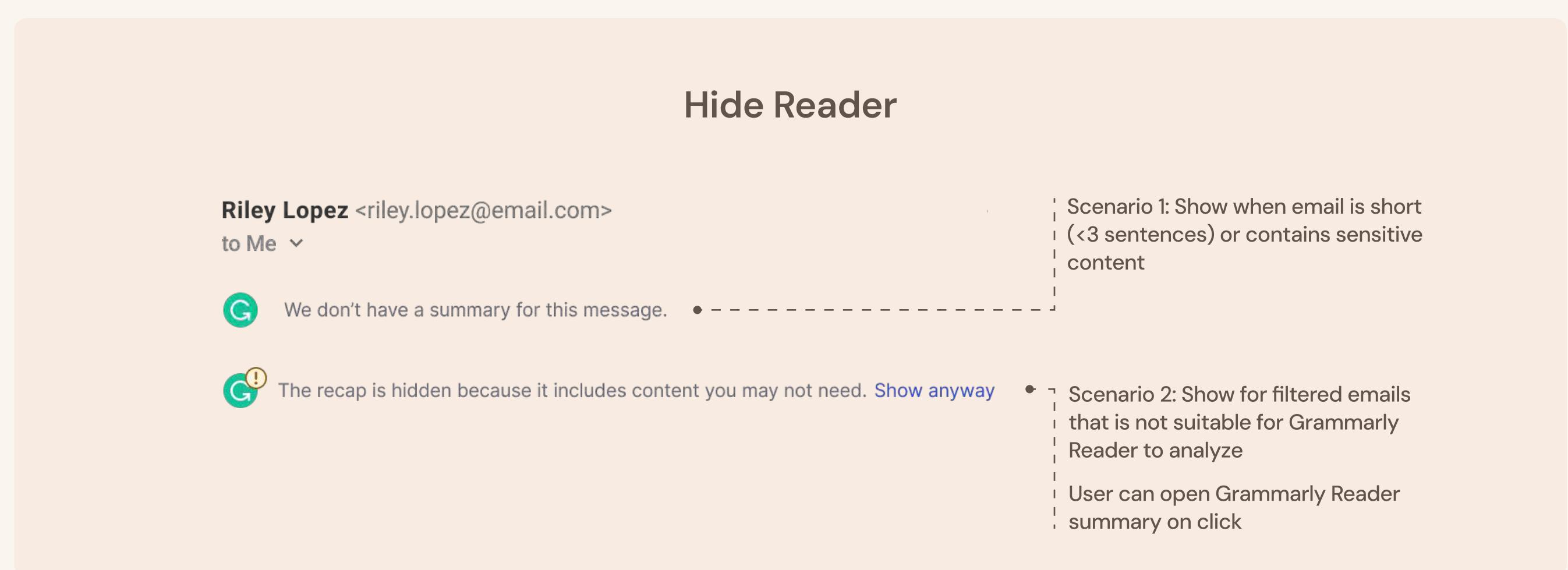


Brooklyn Garcia <brooklyn.garcia@gmail.com>
to Me ▾

G READER

- Brooklyn Garcia is a friend of your business partner, Joey Whistler.
- Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design

Hide Reader



Riley Lopez <riley.lopez@email.com>
to Me ▾

G We don't have a summary for this message. • -----

G! The recap is hidden because it includes content you may not need. [Show anyway](#)

Scenario 1: Show when email is short (<3 sentences) or contains sensitive content

• Scenario 2: Show for filtered emails that is not suitable for Grammarly Reader to analyze

User can open Grammarly Reader summary on click

New iteration, new experiment

We released the new and improved version to another 1% of our paid customers to compare performances

First experiment

The screenshot shows a standard Gmail inbox with an email from Brooklyn Garcia. The message content is as follows:

Hello Riley,

This is Brooklyn Garcia. I am a friend of your business partner, Joey Whistler. A couple of days ago Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design. I'd like to reach out to introduce myself and let you know I am open to discuss further if you are in need of interior design consultation.

Let me know what works for you. I can be reached via email or by phone: 837-938-9273.

I look forward to hearing from you.

Best Regards,
Brooklyn Garcia

Brooklyn Garcia | Interior designer
P: 837-938-9273 | e: brooklyn.garcia@gmail.com

READER

SUMMARY

Brooklyn Garcia is a friend of your business partner, Joey Whistler.
Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design.

FOLLOW-UPS

Let me know what works for you.

New experiment

New placement, added consent step, improved layout

The screenshot shows the updated Gmail interface with the 'Reader' sidebar moved to the right. The message content is identical to the first experiment. A consent dialog is overlaid on the bottom right:

Improved position and visual to show summary

READER

- Brooklyn Garcia is a friend of your business partner, Joey Whistler.
- Joey asked if I am interested in connecting with you on possible collaborations for a couple of commercial buildings' interior design.

Follow-ups

Let me know what works for you.

grammarly

Email Reader

Allow Grammarly to: Collect and process the text, subject line, and metadata of your email summarization.

Identify takeaways

Turn message into quick summary with action items to share with others.

Always in control

You can turn off email reader any time.

Cancel Continue

Impact & Insights

The changes led to a significant adoption boost, helping us evaluate our original hypothesis with more users

Hypothesis with Grammarly Reader

Accelerate reading and boost content comprehension



What we've learned

It's not always about speed
Users will read in detail when necessary

Ease daily email stress and frustration



Helped triage content **Opportunity**
Users can decide whether to keep reading or move on to the next task

Improve clarity in composing email replies



Transfer of knowledge **Use case**
Sharing of the summary with peers was beneficial to business users

New iterations performance

20.4% +8.0 from 12.4%

Adoption rate overall

8.5% +5.3 from 3.2%

Adoption rate within a day of release

0.3% +0.1 from 0.2%

Engagement rate

Emails with Grammarly Reader interacted at least once

Next step

Based on what we learned,
I proposed the following
strategic directions:

- **Refocus on business customers**, where AI summarization has stronger use cases and higher impact
- **Expand beyond email**, supporting high-stakes content (e.g., business documents, briefs and internal messages)

The screenshot shows a Google Doc titled "Project Tiger Marketing Doc". The document discusses Project Tiger's features and strategic marketing approaches. A sidebar on the right provides a summary and common questions.

Summary:

This is a Marketing Specification that unveils our comprehensive plan to conquer the market. It combines strategic marketing approaches, [1] brand positioning, targeted advertising campaigns, and effective customer engagement tactics. [2]

Common questions:

- What is Project Alpha?
- How does Referral program work?
- Ask other questions

A callout box from Brooklyn Garcia asks to review the proposal, with a note to "Pull in context of the document from its original source".

Case study 3

Improve the Clio Payments activation experience

Growth UX/UI Design End-user focus Growth

Clio Payments enables legal professionals to accept online payments through Clio, powered by LawPay in the U.S.

Highlights

23% -22 from 45%
Bounce rate

51% +26 from 25%
Submissions completed < 10 min

1.2 -1.8 from 3
Visits per steps

Context

Improving activation strengthens the foundation for growth, unlocking future engagement and expansion opportunities.

This helps our users to streamline their collection process while creating new revenue stream for Clio.

The problem

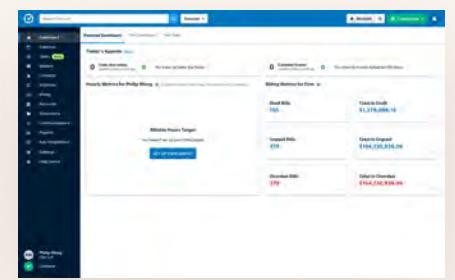
Only 37% of eligible customers were using Clio Payments. Adoption was a key barrier to delivering value

The screenshot shows the 'Sign Up for Clio Payments' page. The left sidebar has a blue 'Settings' tab selected. The main area shows a four-step process: 1. About Your Business, 2. About the Business Owner, 3. Where to Deposit Transactions, and 4. Review and Complete. A note says, 'If you already have a LawPay account, you can activate Clio Payments immediately. [Activate Now](#)'. The 'Tell Us About Your Business' section includes fields for Legal Business Name (Law Office of Mary Chiu), Business Address (123 Main St), City (Austin), State (TX), Zip Code (78780), Phone (5122232342), and Federal Tax ID (123456789). The 'About the Business Owner' section is at the bottom. A top navigation bar includes a search bar, recent items, a timer (00:00:00), and a 'Create New' button.

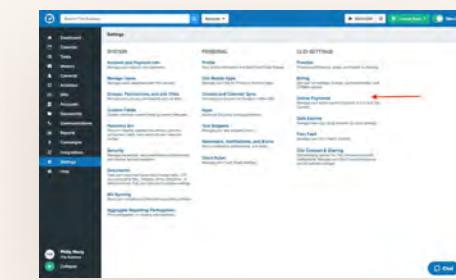
Discovery

Using tracking and in-app surveys, we want to understand what is causing the low activation rate at 37%

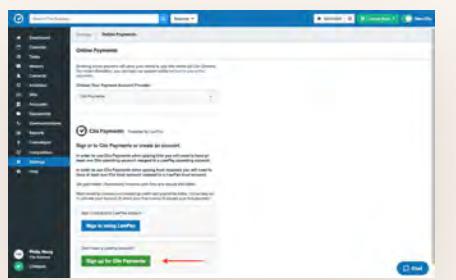
The current activation flow



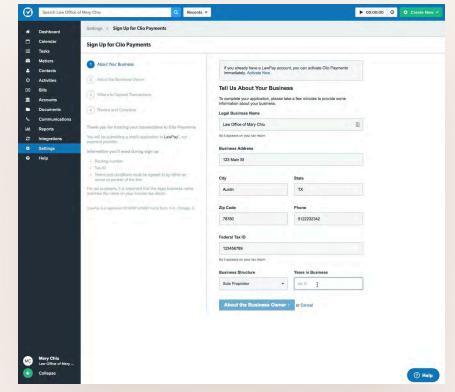
Step 1:
Clio home screen



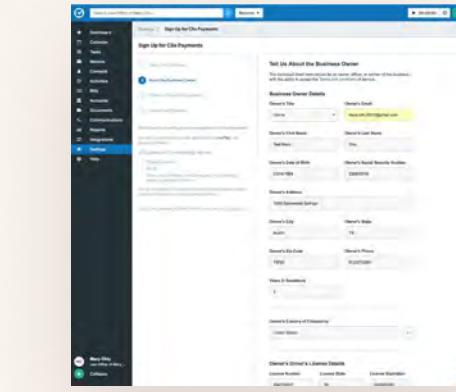
Step 2:
Settings page



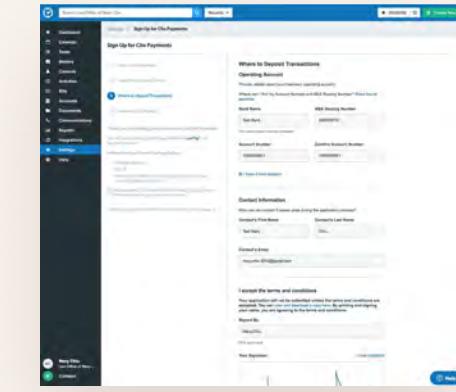
Step 3:
Clio Payments set up page



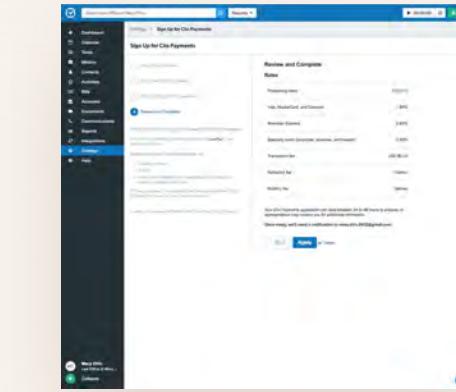
Step 4:
Fill in business info



Step 5:
Fill in owner info



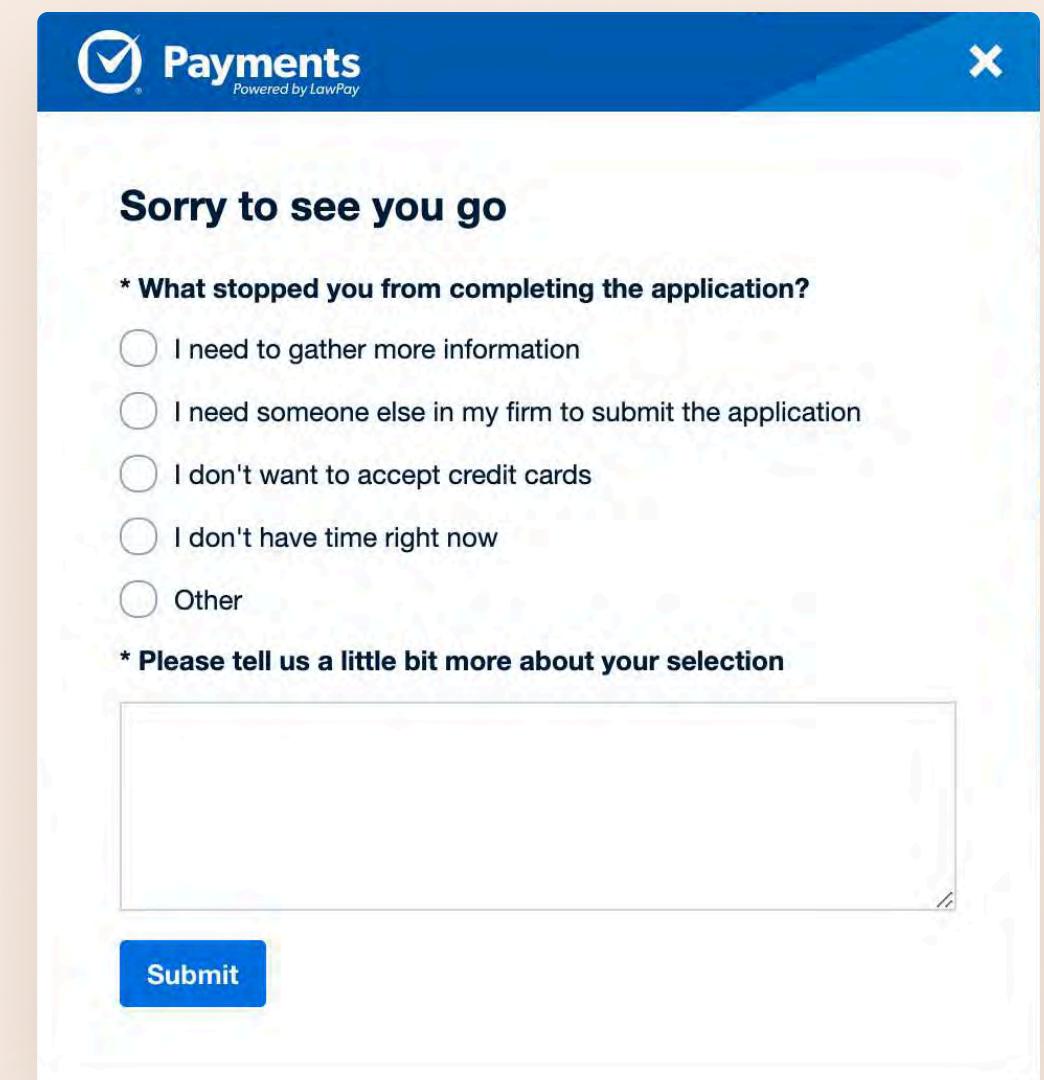
Step 6:
Fill in bank info



Step 7:
Review and submit info

In-App Survey

We asked our users via a modal that shows up upon exit the form



Sorry to see you go

* What stopped you from completing the application?

I need to gather more information
 I need someone else in my firm to submit the application
 I don't want to accept credit cards
 I don't have time right now
 Other

* Please tell us a little bit more about your selection

Submit

Challenges

The signup form was buried in the product with unclear instructions and confusing interactions

Key pain points

Form UX

Special characters triggered silent errors, disabling the proceed button and leaving users stuck

Information gathering

Users weren't warned about required documents until midway, leading to drop-off

Repeated attempts

Incomplete forms couldn't be saved, forcing users to restart each time

Old form performance

45% bounce rate

25% completed in 10 mins

43% completed in 20 mins

3 visits per steps

8 submissions per day

Brainstorm

My PM, EM and I collaborated to explore ideas that could improve the signup activation, while identifying key constraints and tradeoffs we have to make to turn this into a viable product

Define success

How might we help users complete the form once, and do it quickly?

What can we do?

Input masking?

Instant error?

Store incomplete form?

Ask for information upfront during Clio sign up?

Don't populate information from Clio profile?

Skip sensitive information?

Things to consider

Time & Scope

Team skillset

Outcome our customers want

User goals

To help users complete the form smoothly and efficiently, we designed solutions that:

- **Set clear expectations and context upfront** so users know what to prepare
- **Provide real-time, actionable error feedback** so users know how to address the problem

1st iteration

Redesigned the form with clearer visuals and real-time error feedback.

About the firm
Provide this information for a credit check and protect your firm from fraud.

Legal business name required Federal tax ID required

No special characters allowed.

Business structure required Years in business required

Business phone required

Please enter exactly 10 digits.

Business address required

This field is required.

City required State required Zip Code required

User testing

We validated the concept early through user testing to identify usability issues

Key research questions

- Can participants identify errors?
- Can participants complete the form?
- How long it takes to complete it?

Test results

100% 12.4 mins

Completion by 8 participants

Completion time

Scenario

You are a billing manager for Synder & Synder Attorneys at Law P.L.L.C. Today you came across a Clio Payments email and you believe that accepting credit cards will greatly improve the firm's cash flow.

Read through the business information provided.

Once you finish you may go ahead to submit your application to set up Credit Card Payments online.

Note

Before you begin please keep track of when you start and when you complete the application.

Your login information:

Email: demo@clio.com

Password: testtest

When you are done

- Have a look at the time when you completed the task to see how long it took
- Take a screenshot for me when you are on the last screen
- Come back to this doc and answer the following questions on the next page

What we did

Set context upfront

We made the changes to ensure better context is set upfront

Before

Instructions were subtle and often overlooked by users

The screenshot shows a complex, multi-step sign-up process. On the left, a dark sidebar lists various firm management tasks like 'Dashboard', 'Calendar', 'Tasks', 'Matters', 'Contacts', 'Activities', 'Bills', 'Accounts', 'Documents', 'Communications', 'Reports', 'Integrations', and 'Help'. The main content area is titled 'Sign Up for Clio Payments' and contains several steps:

- Step 1: About Your Business**: A note says "If you already have a LawPay account, you can activate Clio Payments immediately. Activate Now". Below is a section titled "Tell Us About Your Business" with fields for "Legal Business Name" (set to "Law Office of Mary Chiu"), "Business Address" (123 Main St), "City" (Austin), "State" (TX), "Zip Code" (78780), "Phone" (5122232342), and "Federal Tax ID" (123456789).
- Step 2: About the Business Owner**: A note says "To complete your application, please take a few minutes to provide some information about your business." It includes fields for "Name" (Mary Chiu), "Address" (123 Main St), "City" (Austin), "State" (TX), "Zip Code" (78780), "Phone" (5122232342), and "Email" (mchui@clio.com).
- Step 3: Where to Deposit Transactions**: A note says "For tax purposes, it is important that the legal business name matches the name on your income tax return." It includes fields for "Routing number" (123456789), "Tax ID" (123456789), and "Terms and conditions must be agreed to by either an owner or partner of the firm".
- Step 4: Review and Complete**: A note says "Thank you for trusting your transactions to Clio Payments. You will be submitting a credit application to LawPay, our payment provider." It includes a "Review" button.

At the bottom, a note states: "Clio Payments is a registered ISO/MSP of BMO Harris Bank, N.A., Chicago, IL."

After

A dedicated screen to help users gather information upfront and reduce bounce rate

The screenshot shows a simplified, single-page setup process. At the top, a note says "Clio Payments is powered by LawPay. This application is a credit check for LawPay to verify your firm and owner's identity." Below is a section titled "Before you proceed" with instructions: "The applicant should be an owner, officer or partner of the firm, entitled to accept LawPay's Terms and Conditions at the end of this application." It includes a "Have these items ready to submit for credit check:" list:

- Business address: 123 Main St, Austin, TX 78780, Phone: 5122232342
- Federal Tax ID: 123456789
- Driver's License / Passport
- Bank details: ABA Routing number, Federal Tax ID, Social Security Number, and Driver's License / Passport

At the bottom, notes say "This Application may take up to 48 hours to process." and "Already a LawPay user? Activate Clio Payments by signing in with LawPay."

What we did

Improve input handling

Improved error handling for clarity and pre-filled the signup form using existing Clio account data when valid to reduce user effort

Instant error
Provide copy to indicate no special characters and instant error for users to understand how to fix it

The screenshot shows a form step titled "About the firm (Step 1 of 4)". A red border highlights an input field containing "Kreiss Law Firm L.". Below the field, an error message in red text reads: "No special characters allowed (Eg. periods or commas)." To the right of the input field is a small icon of a clipboard with a red X.

Autofill scenario
Autofill Clio Payments signup form when no special characters are included from their information on the Clio platform

The screenshot shows the same form step with different input values. The "Business name" field now contains "The Koalaws". The "Federal tax ID" field is empty. The "Business structure" dropdown menu is open, showing "Sole Proprietor" as the selected option.

Impact

Old form performance

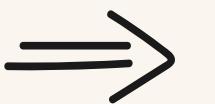
45% bounce rate



New form performance

23% bounce rate -22

25% completed in 10 mins



43% completed in 20 mins

51% completed in 10 mins +26

14% completed in 20 mins -29

3 visits per steps



1.2 visits per step -1.8

8 submissions per day

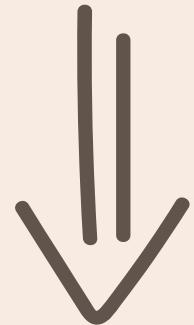


10 submissions per day +2

1 year after redesign

37%

Activation rate



57%

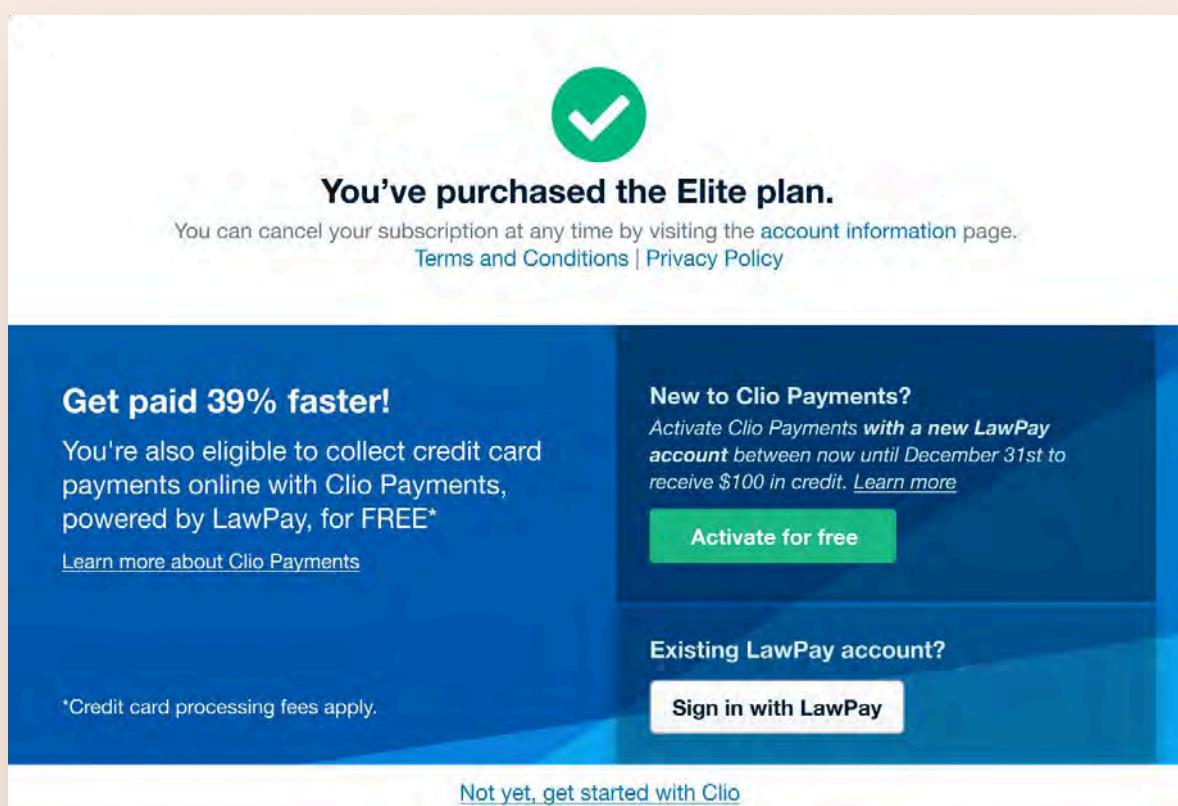
Activation rate

Next step

With a strong activation foundation in place, we shifted focus to driving growth and increasing successful signups

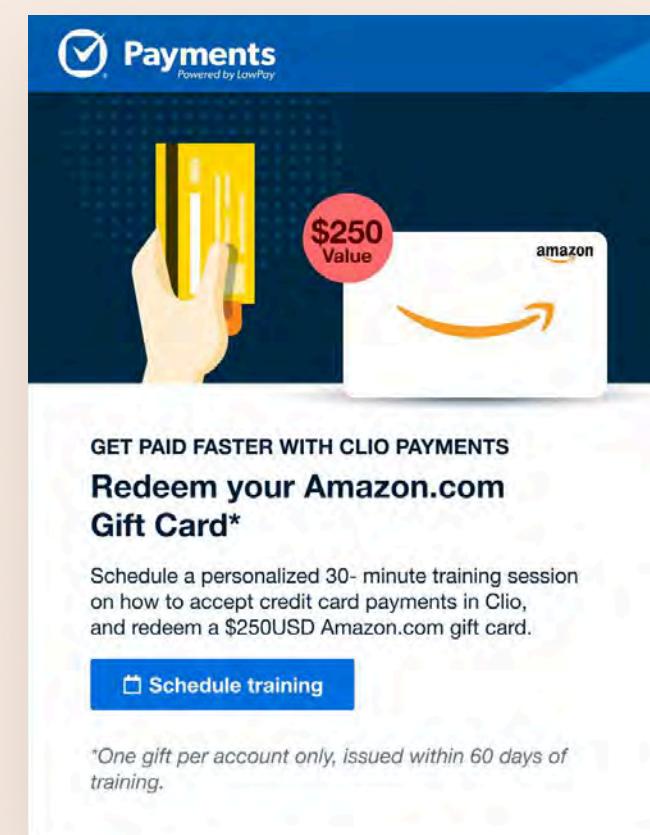
New Clio Customers awareness

Hypothesis: Users are more likely to sign up during Clio platform setup



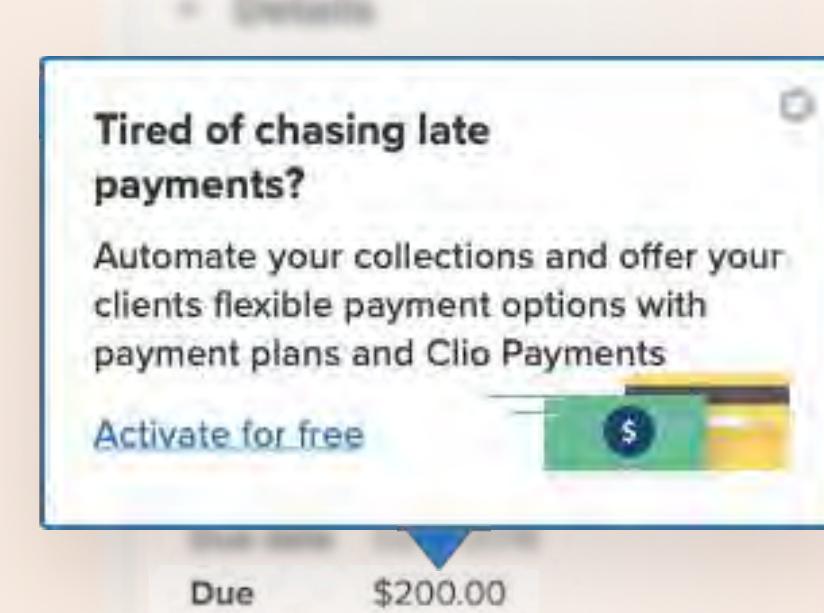
Incentive offers

Hypothesis: Financial incentives increase signup likelihood



In-flow awareness

Hypothesis: Highlighting Clio Payments on overdue bills motivates signups



Thanks

Happy to dive deeper into my case studies

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