Discounts, Trials, True Ups & Frozen Subsriptions for Genesis

Discounts

Background

Grammarly

- Grammarly offers a variety of discounts available to SS customers that drive $20M in revenue per year (full list of Grammarly discounts)
- Similarly Grammarly also has active affiliate partnerships that are also offered as a discount in the backend driving $4M in revenue per year (Current affiliate discounts)

Coda

- Coda also has various active discounts and affiliate programs (some examples below)
  - Students and teachers - free year of Pro (1 seat)
    - Alternatively, they can get 80% off a multi-seat Pro plan or Team plan
  - Nonprofit discount - 50% off
  - Coda startup program - 6 months of Team free (with AI if they come from a partner)
  - Slack Marketplace offer - free 6 months of Coda Pro with AI for paid Slack customers
- These discounts amount to $1M in revenue (full list of Coda discounts)

Decision

> 🔔 **Grammarly: We will honor all existing Grammarly Pro discounts by applying them to Genesis Pro SKU**
>
> For all new Pro conversions:
>
> 1. Customer will be able to checkout using their respective discount if one is available to them
> 2. Customer will get access to Genesis Pro as planned, details about implementation described here
> 3. We recommend the discount team to consider the long term discount strategy for Genesis Pro given we are giving more product with Genesis Pro but at the Grammarly discounts

> 🔔 **Coda: We will honor all existing Coda Pro discounts by applying them to Coda Pro SKU only**
>
> - All Coda discounts are applied manually by customer support or partnerships team.
> - If a Genesis Free org exists for this user they will use an admin workflow to destroy Genesisness and apply the relevant discount to the underlying Coda WS
> - If a Genesis Paid org exists for this user, support will advise them to create a new Coda WS and apply the relevant discount. They could also request a refund for their Genesis Pro subscription
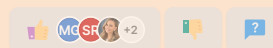
Trials

Background

Grammarly

Grammarly offers a 7 day carded SS Pro trial. Previously this trial was available for customers who have been a Free user for atleast 30 days but a recent experiment brought the trial eligibility to Day 1 post sign up. More details here

Coda

- Given Coda's generous freemium model, which includes unlimited personal docs in the Free tier, most of our workspace-level "trialing" takes place in the Free tier. Coda has previously experimented with self-serve Team trials (including opt-in and 30-day reverse Team trials), but don't currently offer self-serve paid trials. We offer Enterprise-tier trials via our sales/support team.
- Coda also offers a Zoom partnership which is implemented as a trial in the backend (Zoom Essential Apps Bundle - free 1 year of Coda Pro for paid Zoom customers)
- Packs can also be trialed for 14 days prior to purchase.

Decision

> 🔔 **Genesis: Genesis Pro Trials will be the same as Grammarly Pro**
>
> Since Grammarly Pro Trials are offered by the Billing backend systems and Genesis Billing system is built on top of Grammarly billing

True Ups

Background

Grammarly

Grammarly offers True Ups for SS Pro and GB Teams customers with 2+ seats. More details about Grammarly True Ups can be found here

Coda

In Coda, self-serve (Pro, Team, self-serve Enterprise) customers are billed by the number of paid users (Doc Makers) in the product, rather than by a "pre-paid" number of seats. Newly added paid users are billed on a prorated basis as soon as they're added, and invoiced at the next monthly invoice.

Managed Enterprise customers on annual contracts are typically trued up on a quarterly basis, co-termed to end of the contract.

At the user and doc level, in most of our workspaces Doc Makers (our paid role) have a 7-day grace period before they're billed, and in some workspaces users can trial the Doc Maker role for 14 days while waiting for admin approval.

Decision

🔔 **Genesis: Will not offer True Ups for now**

- [Updated] If we look at True Ups to understand the impact from new customers vs existing customers
  - True Ups from New customers **~16%, $15k**
  - True Ups from Existing customers **~62%, $98k**
  - Please note, these numbers are not perfect given True Ups have a 3 month True up cycle. We ran this data for Aug 8 - Sep 8. Account created before May 8 were considered Existing, Accounts created after May 8 were considered New. Raw data here
- We will not implement True Ups for Genesis for the October launch.
- We will have a post October follow up to implement True Ups for Genesis that will be prioritized against all other post October launch items
- Genesis will offer seat expansions billed at the time of when a new seat is added.
- For Coda WS without an org, no changes to existing Coda flows.

Closed Decision: Frozen Subscriptions

Background

Grammarly

1. When a Grammarly Pro solo user joins another Institution, their existing Grammarly Pro subscription is frozen

2. When this user leaves their new Institution, they rejoin their previous institution and their original Grammarly subscription is unfrozen

3. While such a user is in the new Institution, they can also reach out to customer support and ask for a refund. In this case a refund is processed and their frozen subscription is ended. When such a user is removed from their new Institution, they become a Free user.

Decision

🔔 **Genesis: We will not offer Frozen Subscriptions for Genesis at this time**

- Given we only have ~3k frozen subscriptions vs >3M Pro subscriptions we have decided to not offer frozen subscriptions for Genesis at this time.
- For existing Grammarly Pro users who do not have a Genesis org and get added to a Genesis org via a join mechanism, we will continue to offer frozen subscriptions for them.

Done Reading?

Dory: Topics for discussion

Done	Question	Author	Upvote	Notes
☑	*Frozen Subscriptions:* *Does it mean that we need to remove "Genesiness" for existing Grammarly Pro customers who joined and then left Genesis org and reactivate their "frozen" Grammarly Pro subscription?*	AS	👍 👤	▤
☑	*Is there any concern about user figuring out that they can get trial and discount access to Genesis via Grammaly? Or is that a known risk for now that we will just revisit?*	👤	👍 JK	▤
☑	*This document outlines discounts and trials for Genesis on the current Grammarly funnel post October 8. What about the discounts and trials for the Genesis subscription on the new Genesis funnel?*	👤	👍	▤
☑	*Are we considering a day 0 trial for Genesis? 👀*	👤	👍	▤

Appendix

Discussion on Grammarly discounts

	Option 1 (Recommended)	Option 2	Option 3	
Description	1. Customer sees Grammarly discount via an email 2. Customer uses Grammarly discount to checkout Genesis Pro 3. A Genesis org is created for such a customer if one doesnt exist already	1. Customer sees Grammarly discount via an email 2. Customer uses Grammarly discount to checkout Genesis Pro 3. A Genesis org is created for such a customer if one doesnt exist already	1. Customer sees Grammarly discount via an email 2. Customer uses Grammarly discount to checkout Grammarly Pro 3. Customer does not get a Genesis org. If a Genesis org exists, it is destroyed for the customer	1. 2. 3. 4. 5.
How will it work	1. Billing uses plan-level SKU = Grammarly Pro to provide the discount 2. Billing uses subscription level SKU = Genesis Pro to provide feature entitlements	1. All existing discount campaigns are updated from Grammarly Pro → Genesis Pro maintaining existing campaign ids a. LCM can continue to use existing campaigns 2. Billing uses Genesis Pro both plan level and subscription level SKUs		
Pros	1. Seemless to the customer, keeps existing discount campaigns alive	Same as Option 1		

Cons	1. Might create P&P risk since we are giving a Grammarly discount for the bundle, although both are similarly priced
	  a. Clarified with P&P that reusing existing discount campaigns for Genesis Pro is ok in the short term. Recommendation is to rethink discount strategy for Genesis Pro in 2026
		1. Might create P&P risk since we are giving a Grammarly discount for the bundle, although both are similarly priced
		  a. Clarified with P&P that reusing existing discount campaigns for Genesis Pro is ok in the short term. Recommendation is to rethink discount strategy for Genesis Pro in 2026
		2. More effort for billing to update campaigns, discounts for various levels, updating cache
			1. May not be feasible for XPS to support destroying Genesisness by Oct 8, can be a fast follow up
			2. Moves us away from the north star
				1.

Free Trials

  a. Special separate campaign for Grammarly Pro free trials

  b. Same solution as discounts

  c. The same trial plan for Grammarly will be used for plan level SKU, for subscription level SKU we will use Genesis Pro

  d. Starting a Grammarly Trial, will also trigger a Coda Pro trial. If the Grammarly Trial is cancelled, it will also trigger a Coda Pro cancellation