

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.

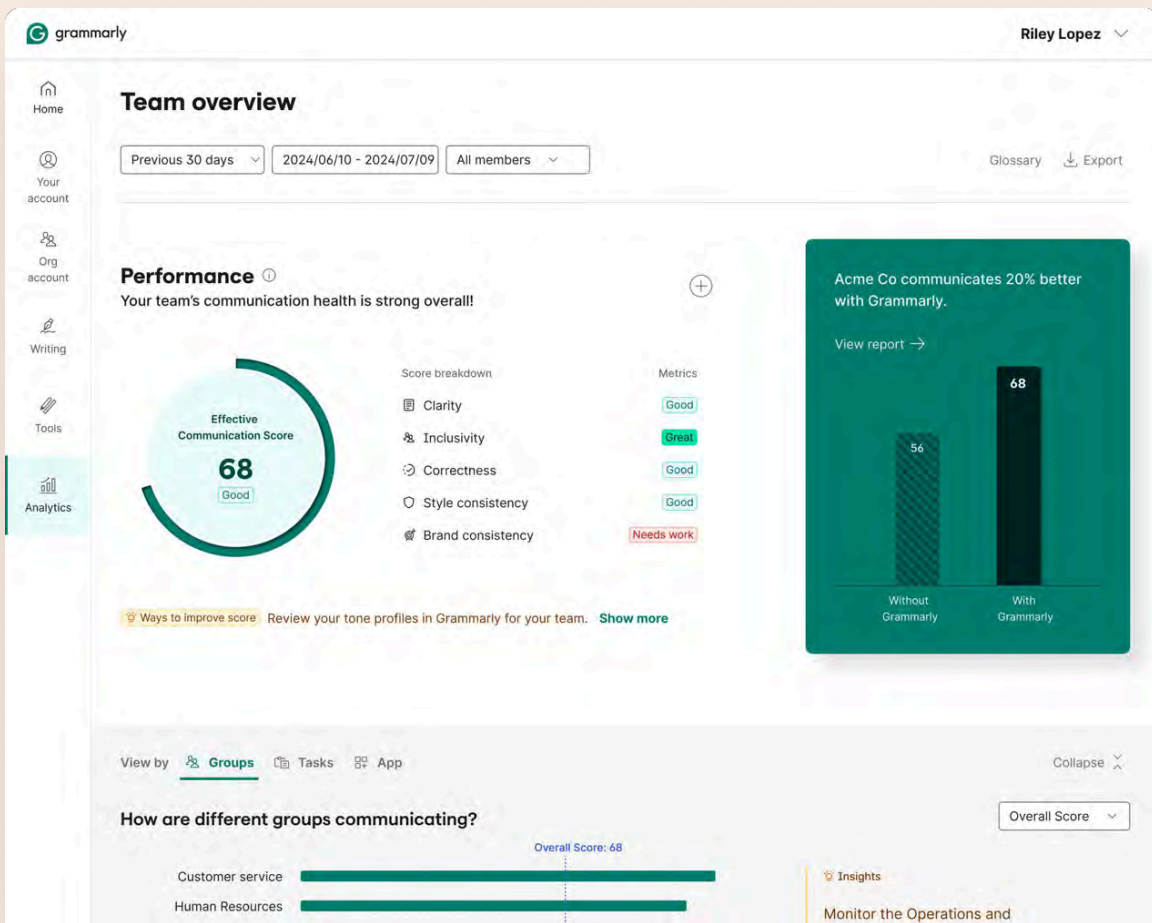
Best Buy Canada 2011-2016
Visual Design Lead, 2015 – 2016

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

Case studies

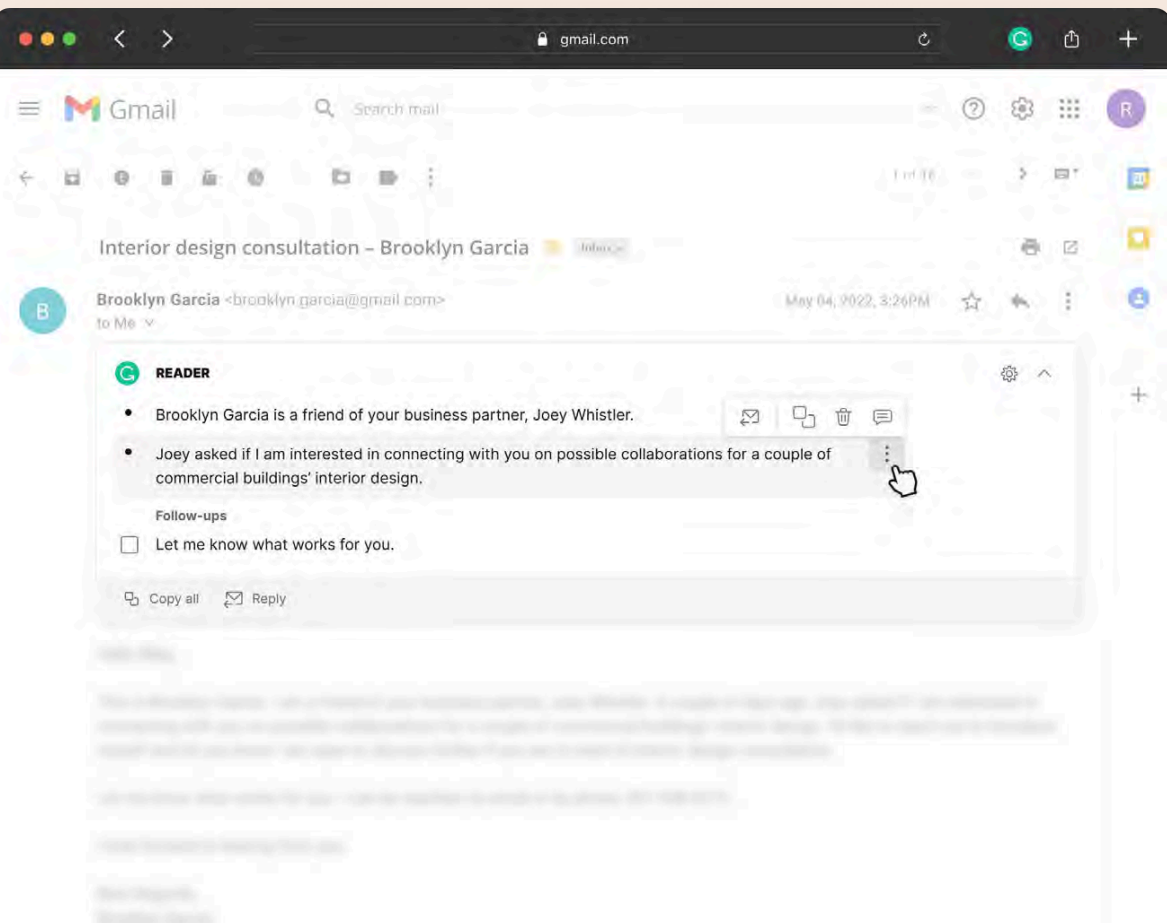
10x Grammarly customers’ expansion deal size

- 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 for Clio Payments activation. It includes fields for 'Business name' (The Koalaws), 'Federal tax ID' (empty), and 'Business structure' (Sole Proprietor). There is a 'Years in business' section with a dropdown menu. The 'Business address' section includes fields for 'City' (San Diego), 'State' (California), and 'Zip code' (30081). A 'Business phone number' field contains the 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

Journey map and card sorting exercise

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

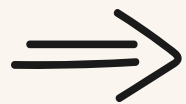
Strategic approach

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



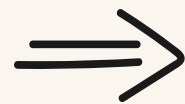
Mid-term

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.

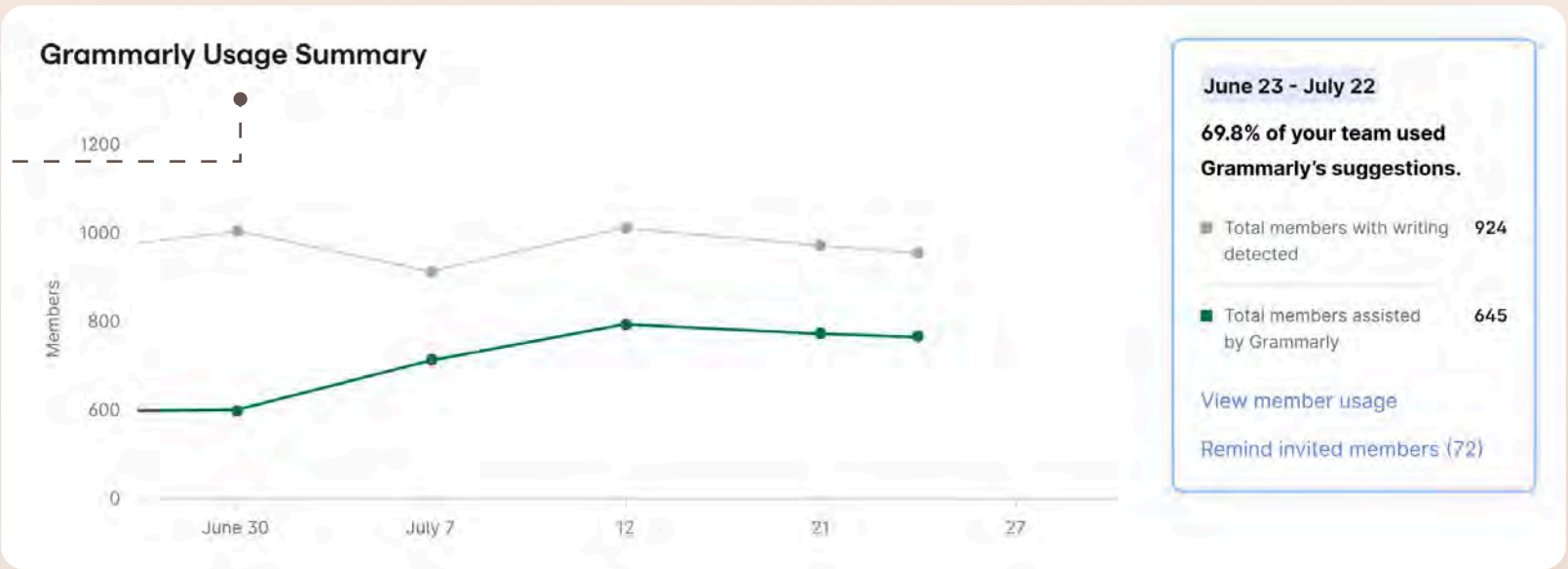
Before



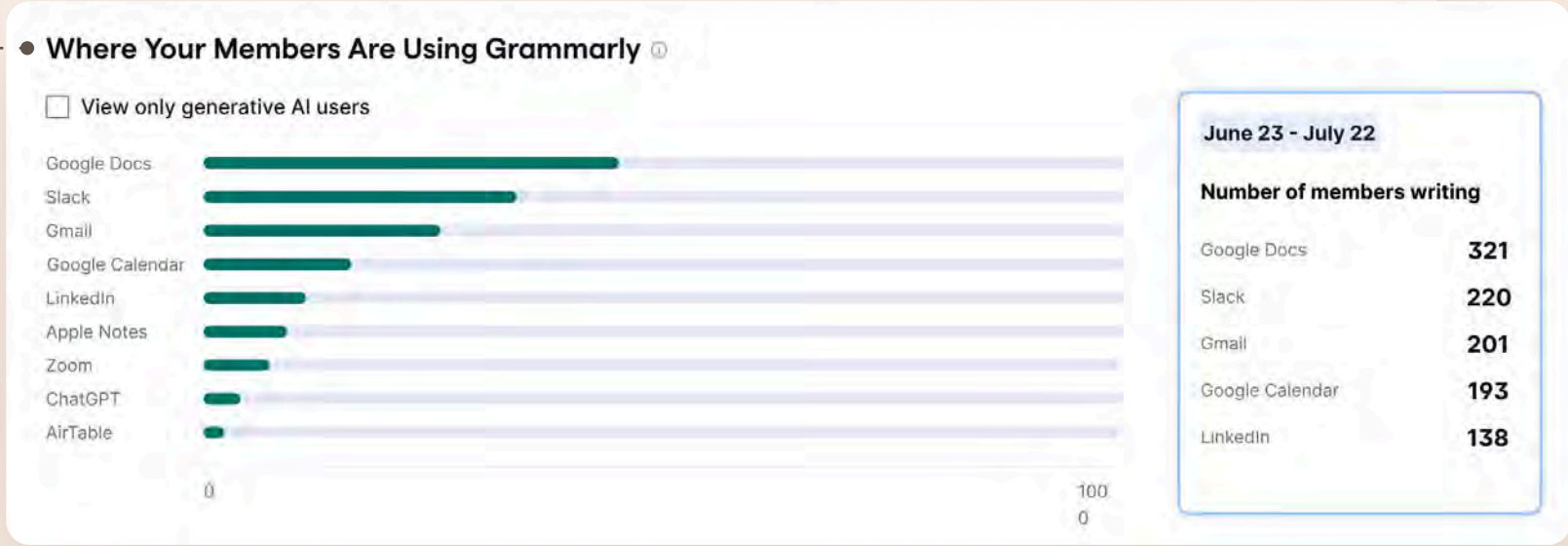
This metric showed how often Grammarly is turned on instead of how many people used Grammarly. This does not resonate with buyers when they evaluate its value

After

Replace “Active Team Members” graph to show how many people used Grammarly for their writings in the organization



Add in new insights to show where Grammarly is making an impact for the organization



Mid-term

Early access

Benchmarking program

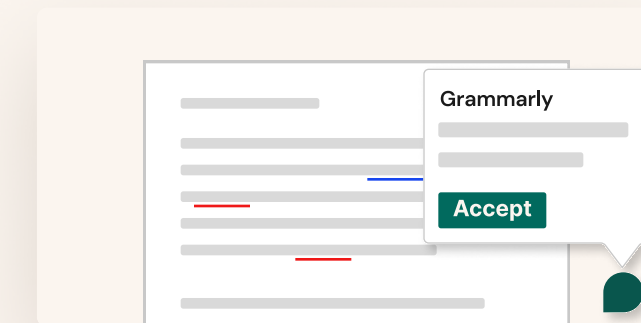
Research showed buyers want to see progress over time. To support this, we launched a benchmarking program during the trial period to **compare communication performance with and without Grammarly**, creating a baseline to demonstrate value and drive expansion

Benchmarking process

Buyers select participants

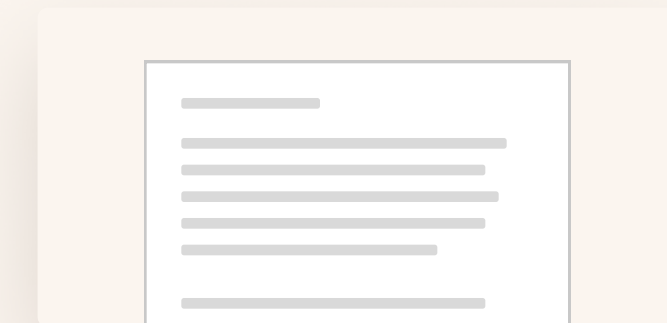


Run Grammarly
normally



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

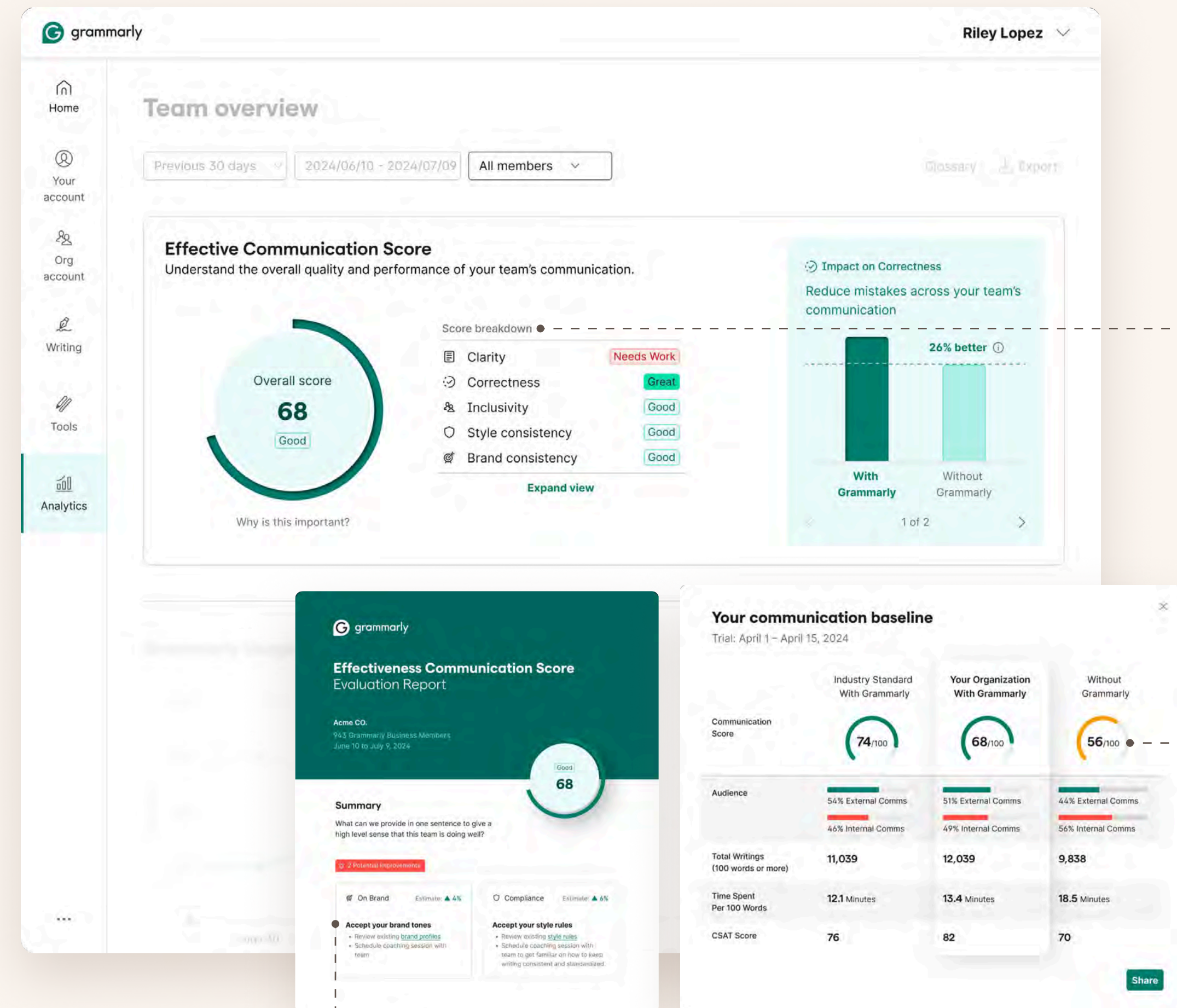
Early access

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.



Detailed breakdown of measurable performance data

Use scores to compare key benchmarks such as industry standards and pre-Grammarly performance

Offer recommendations on how to improve using Grammarly's features

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

DailyPay

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

5K+

United Wholesale Mortgage

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



Usage

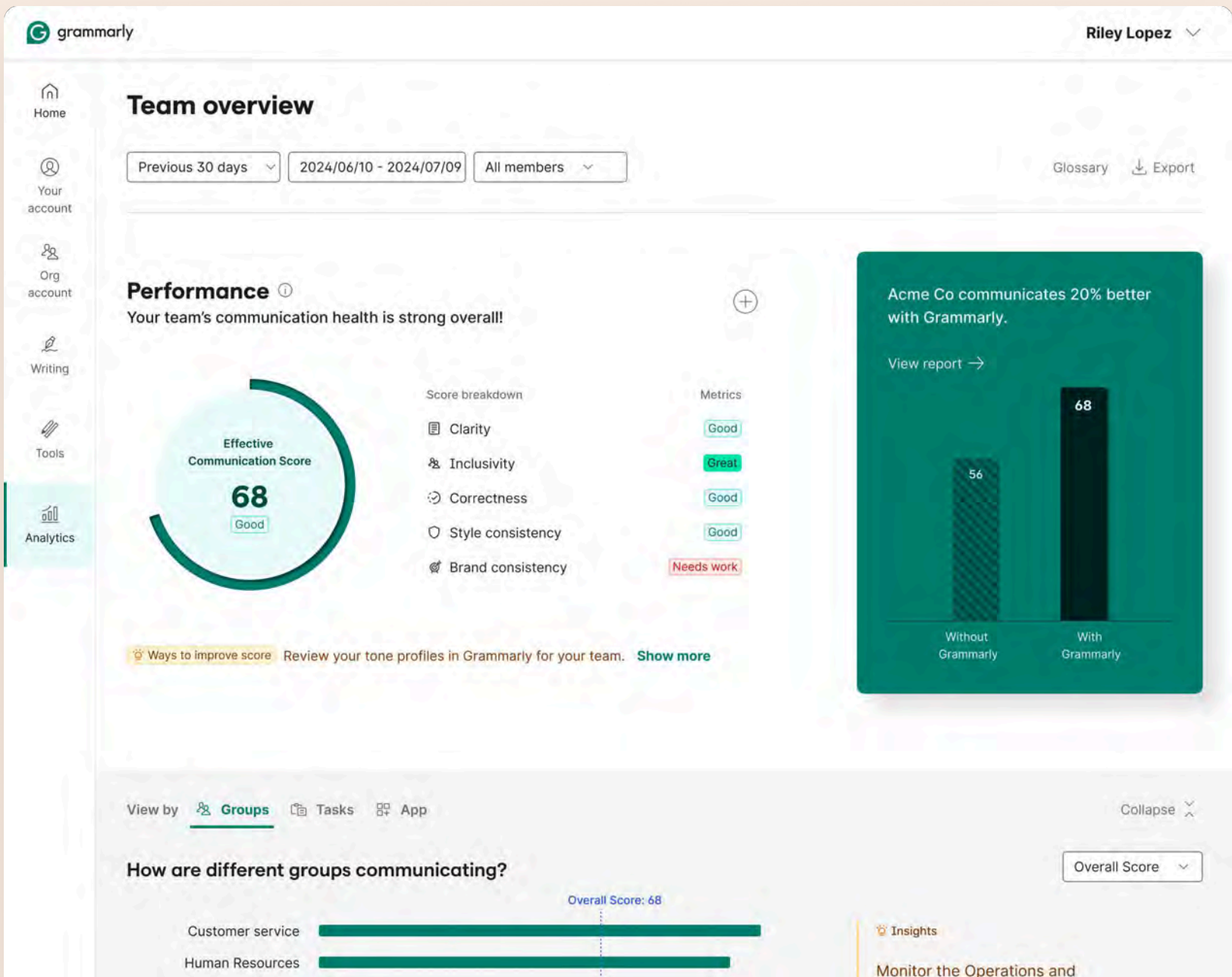
Teleperformance Columbia

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

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

Future

Renewal conversation with buyers

Grammarly improved 74 support tickets with a score of 85.

Case study

Expand Grammarly beyond writing with email summarization

Generative AI

0 → 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



Positive
feedback



Adoption &
engagement



Identify
user case



Reduce
reading time

Grammarly Reader

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

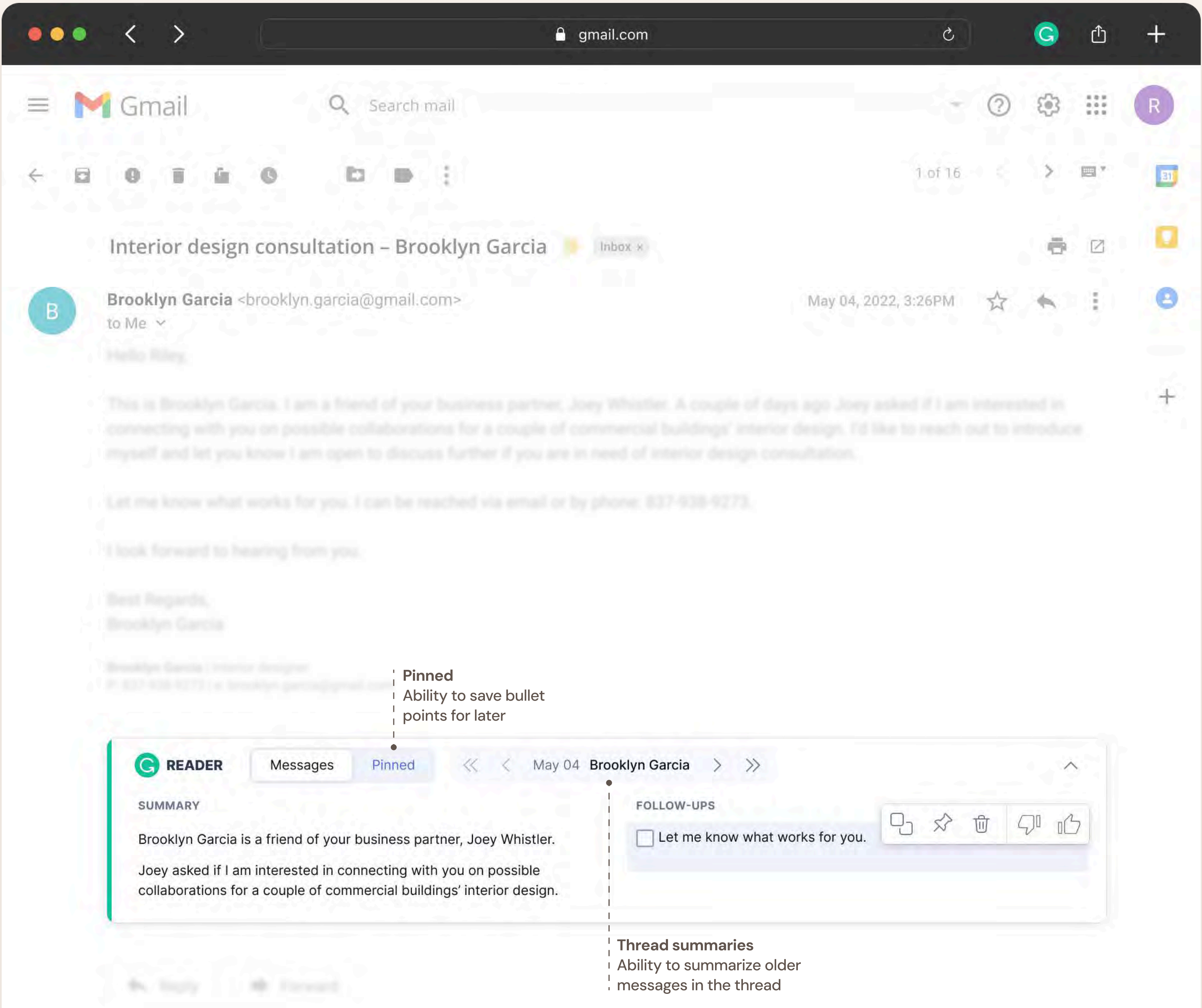
Format

Chrome extension

Experiment

1% of paid customers

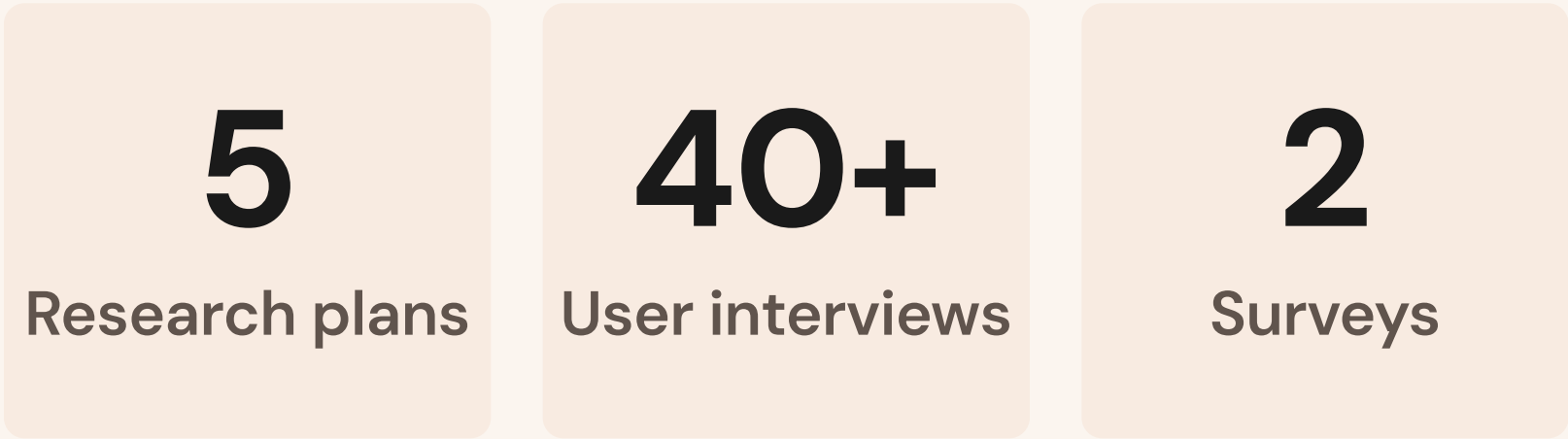
Individual accounts



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



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

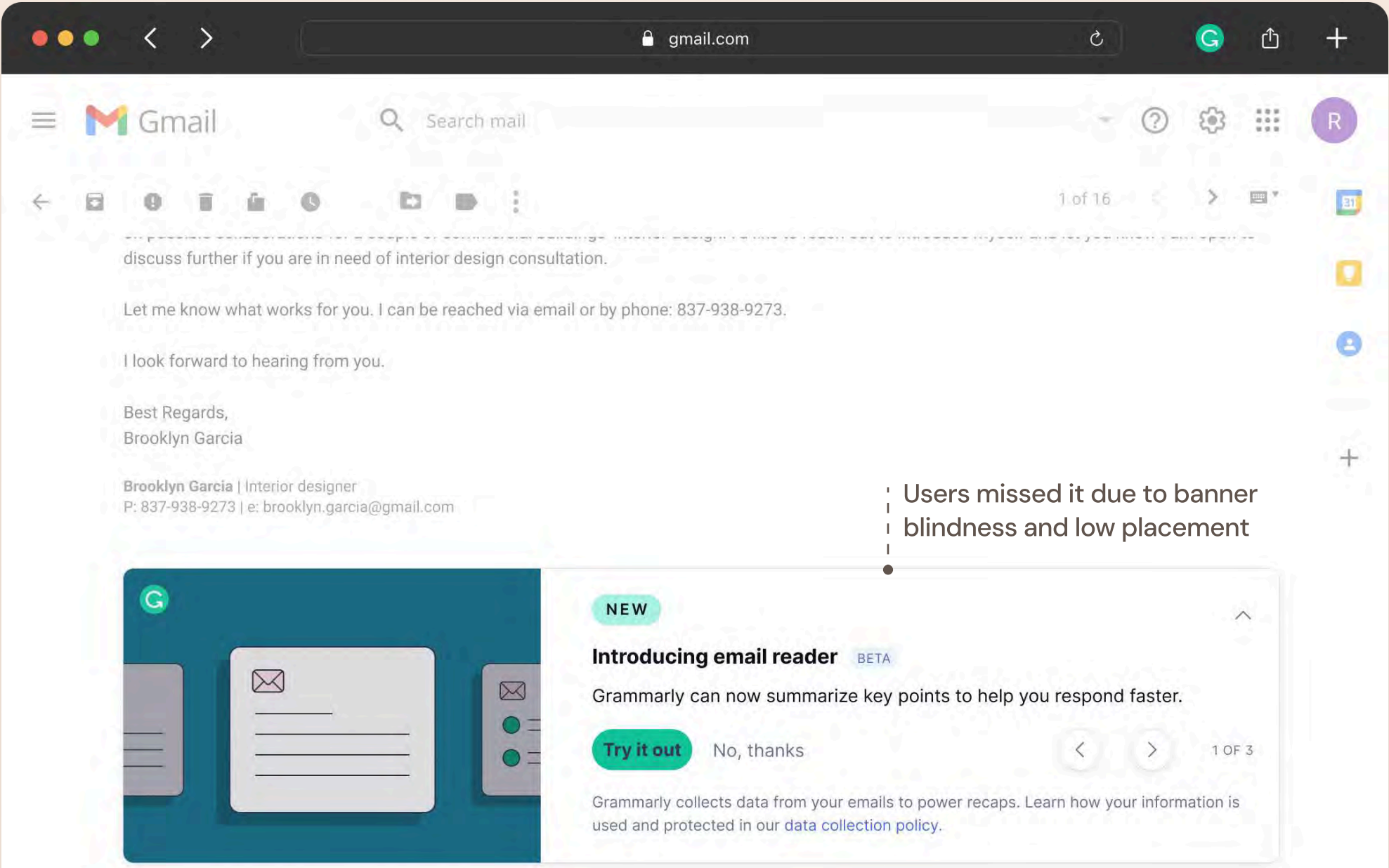
Lacked critical information
e.g., Dates, phone numbers

What we did

Boost Visibility

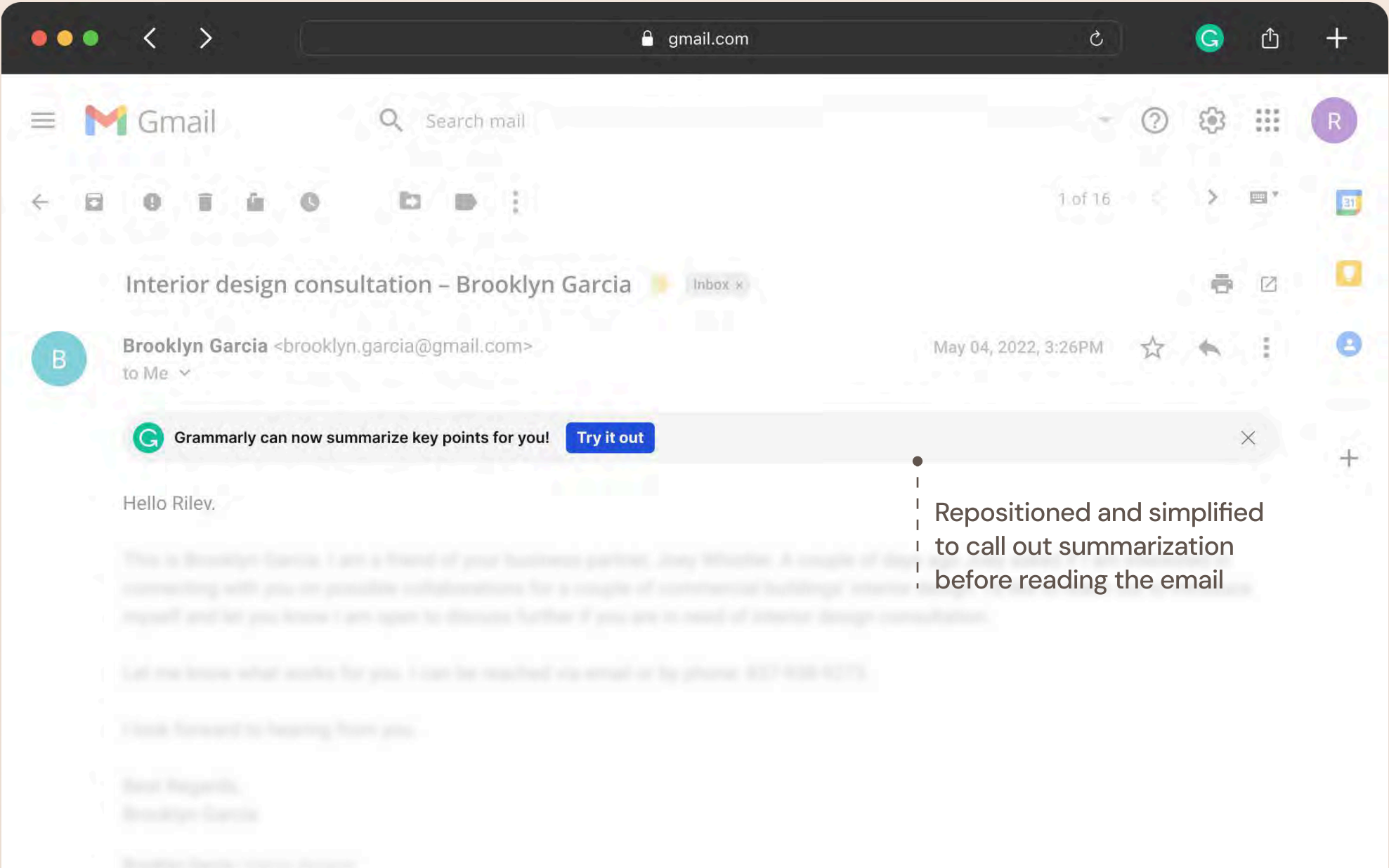
Streamlined messaging above the fold to clearly indicate email summarization before reading, reducing visual distractions

Before



After

Above-the-fold summary prompt

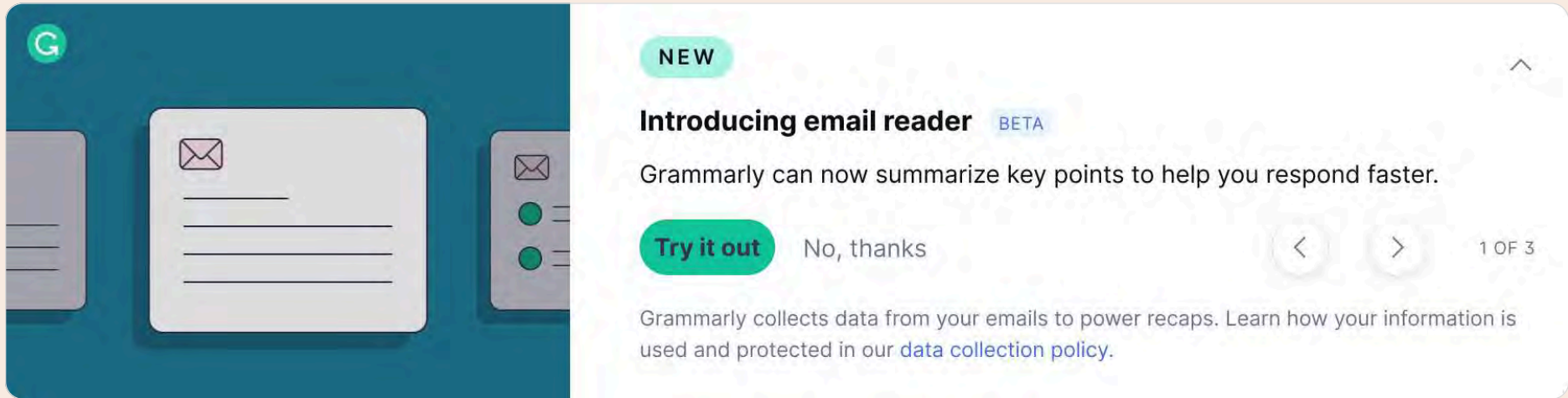


What we did

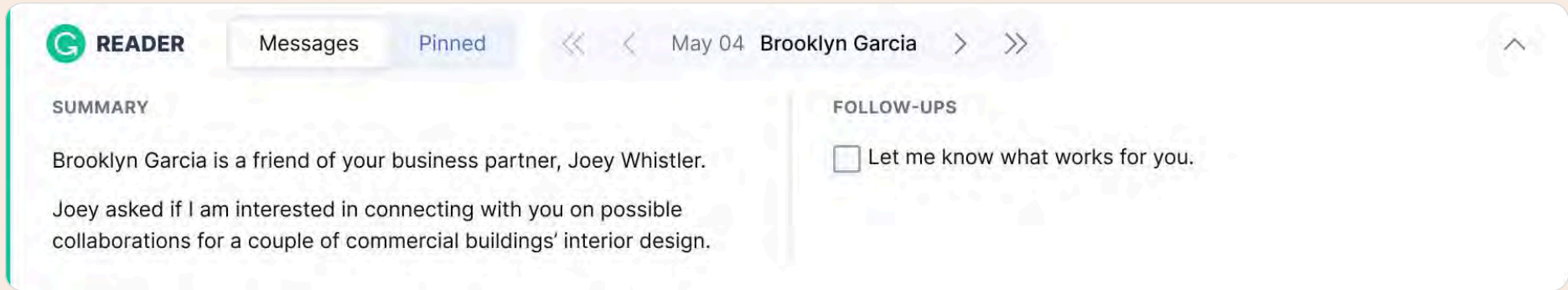
Build trust

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

Before

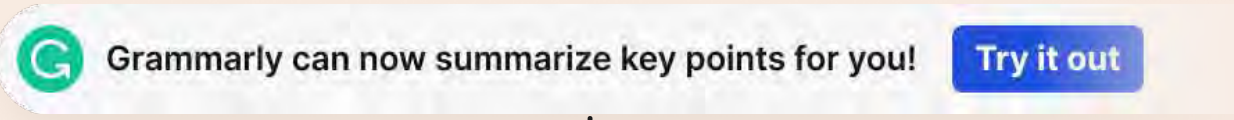


Launch Reader

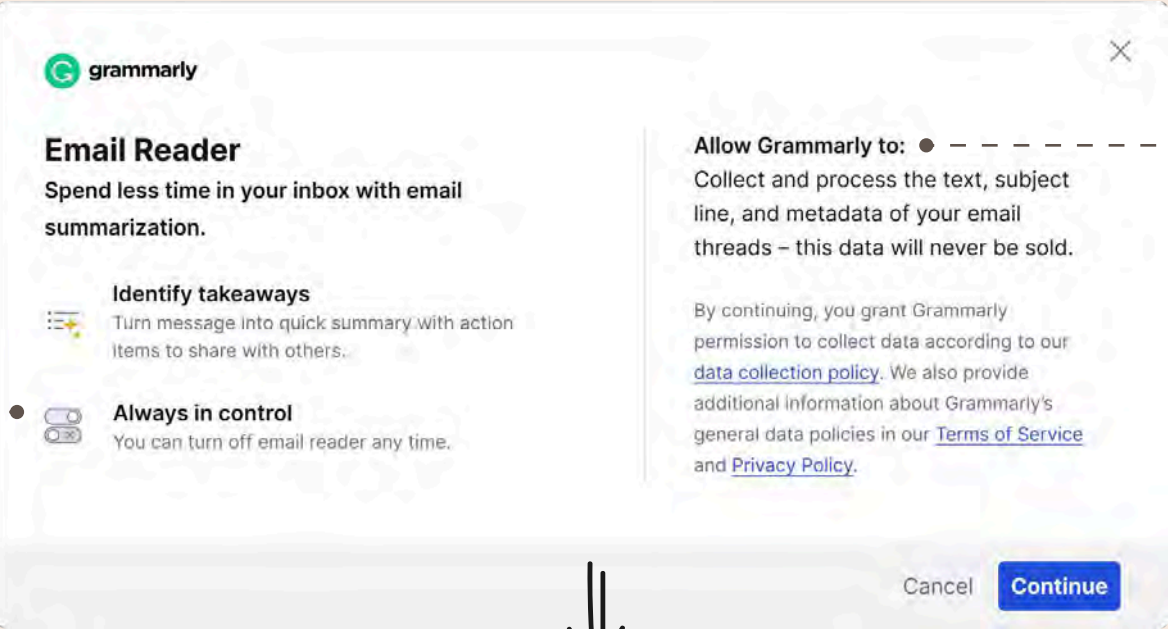


After

Built trust with a clear, upfront consent prompt



Show a review modal



Explain specific data to collect

Reassure users they can opt out at any time



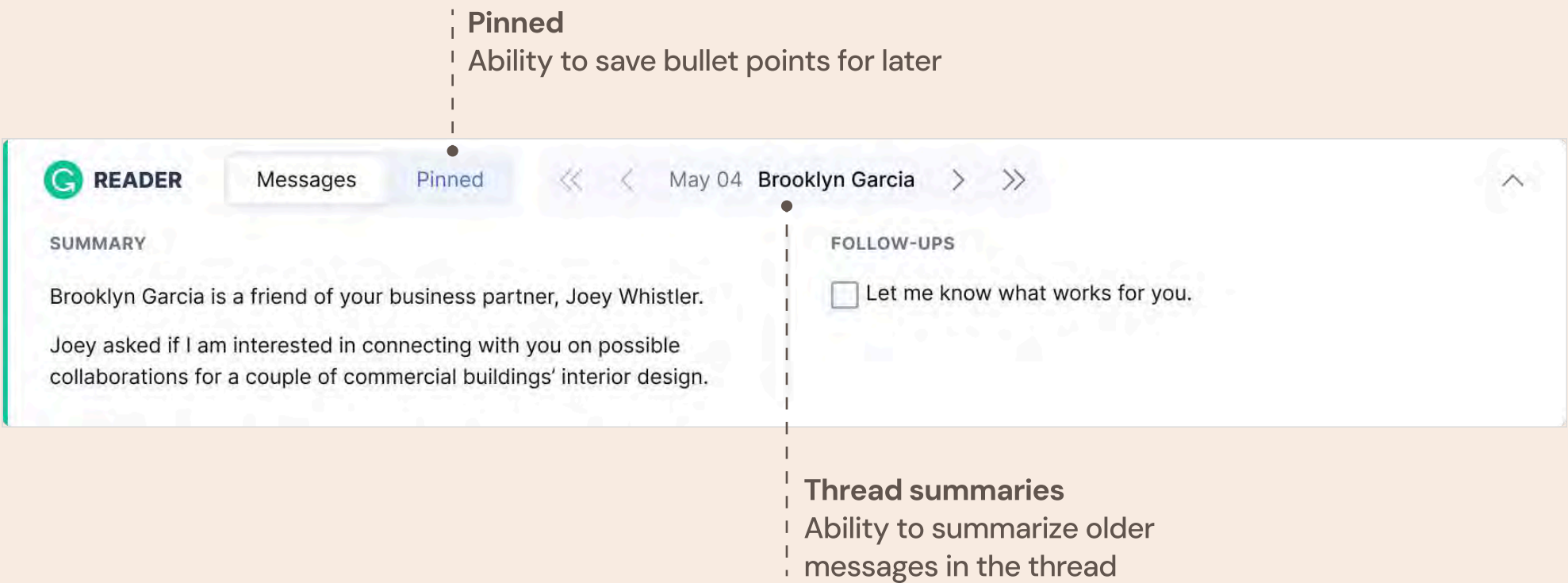
Launch Reader

What we did

Reduce complexity

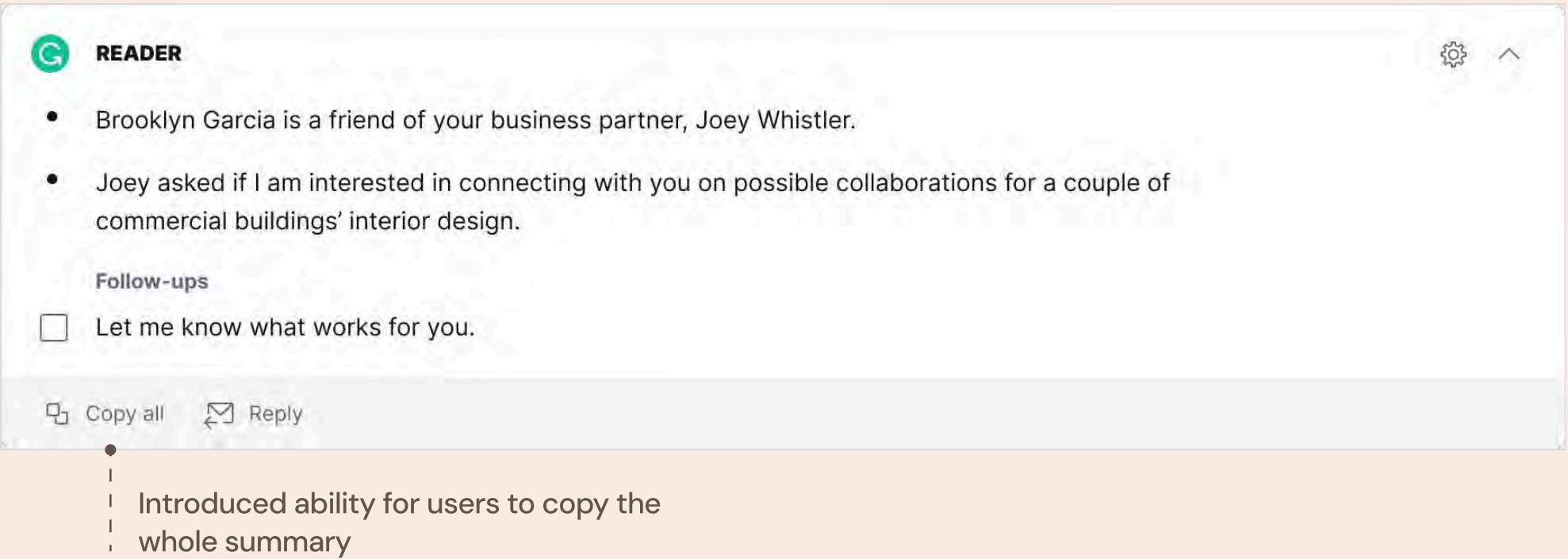
Data showed **86% of emails were read only once**. Based on this, I removed low usage features to focus on delivering value during the first read, the most critical moment for evaluating product-market fit

Before



After

Removed low-use features, simplify layout



What we did

Design around limitations

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

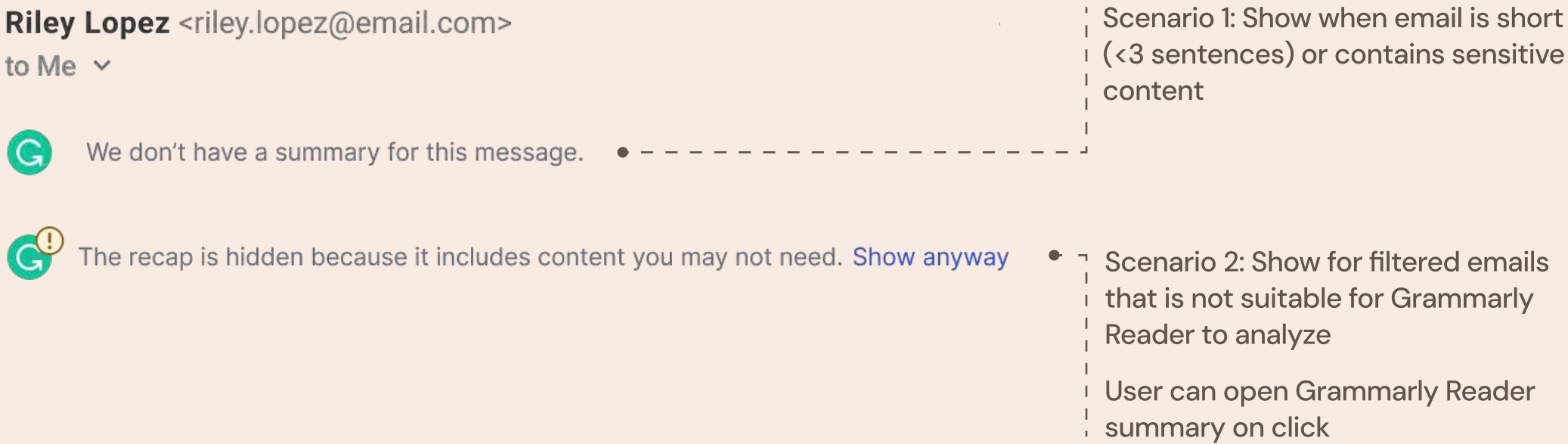
- The email was sent by a human
- The email was long in length

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

Show Reader by default



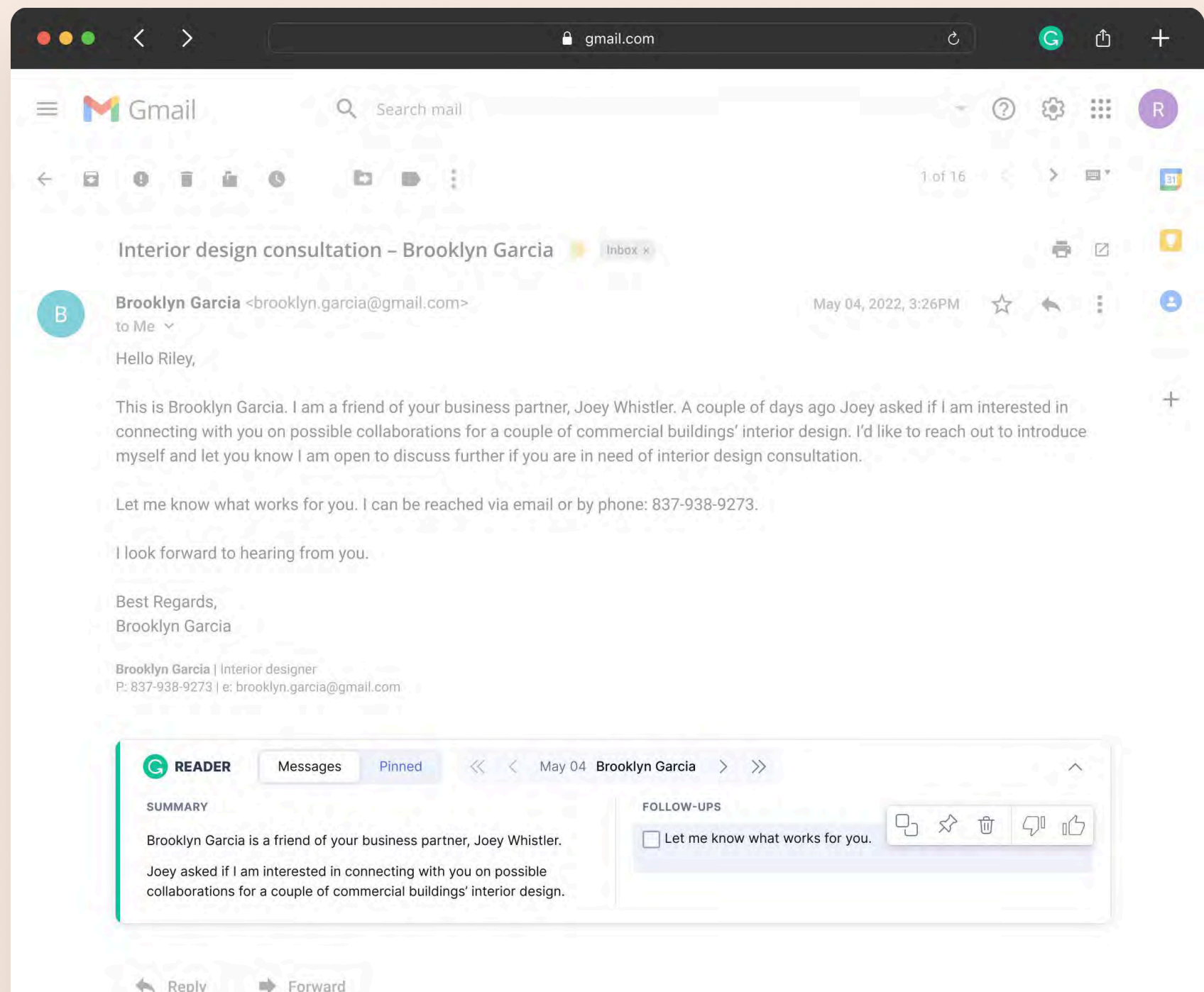
Hide Reader



New iteration, new experiment

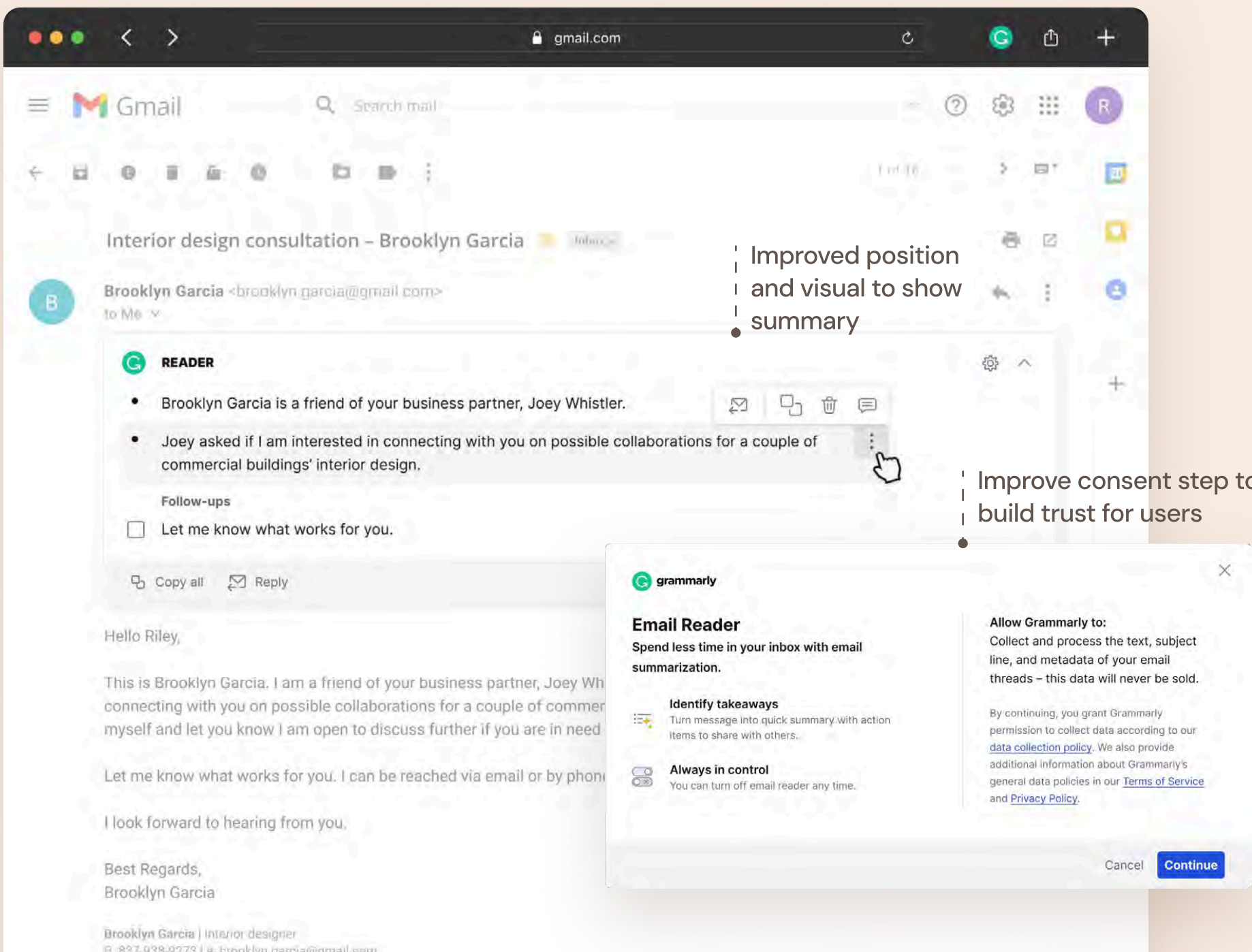
We released the new and improved version to another 1% of our paid customers to compare performances

First experiment



New experiment

New placement, added consent step, improved layout



Impact & Insights

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

Hypothesis with Grammarly Reader

What we've learned

Accelerate reading and boost content comprehension



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

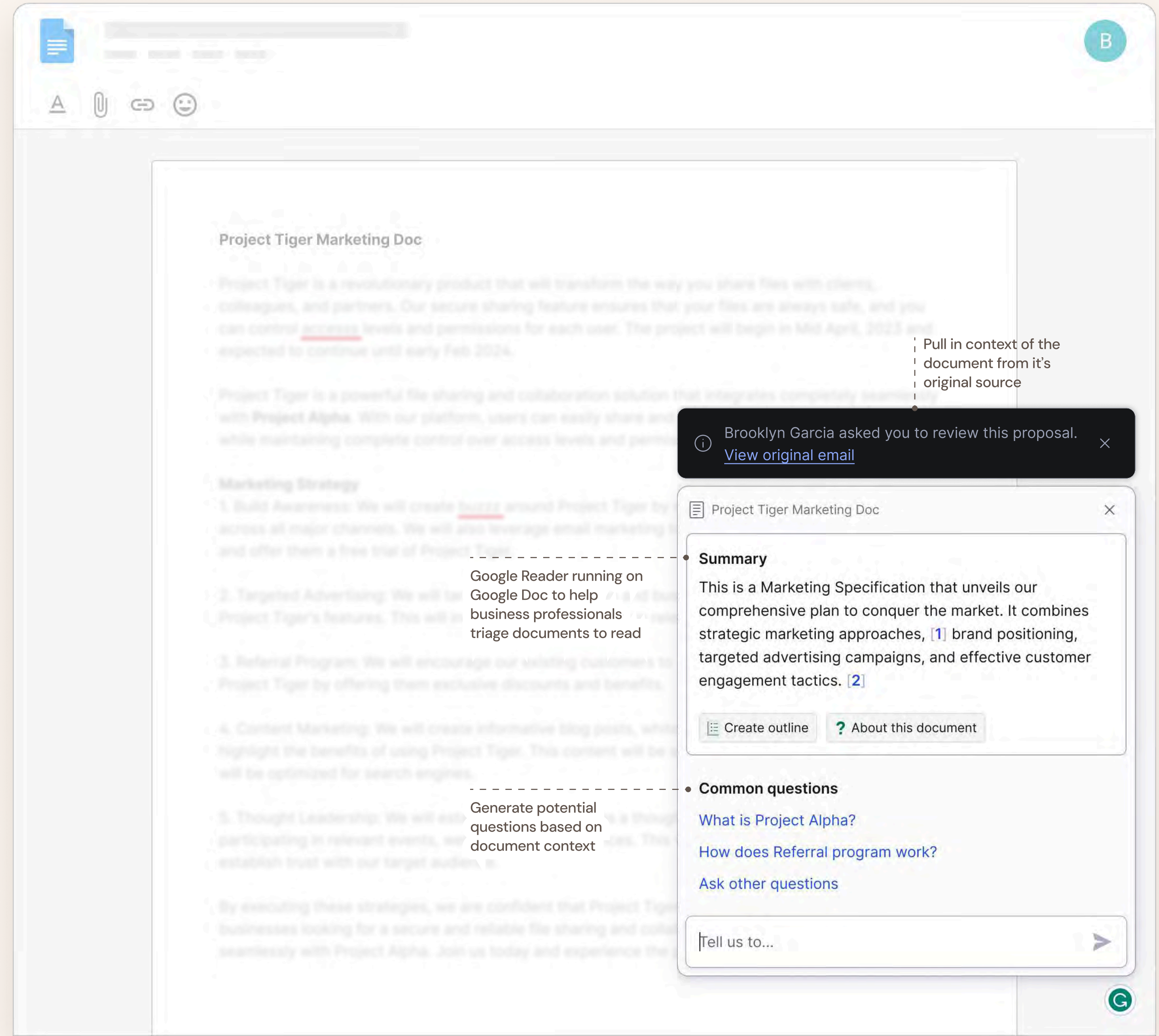
8.5% **+5.3 from 3.2%**
Adoption rate within a day of release

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)



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

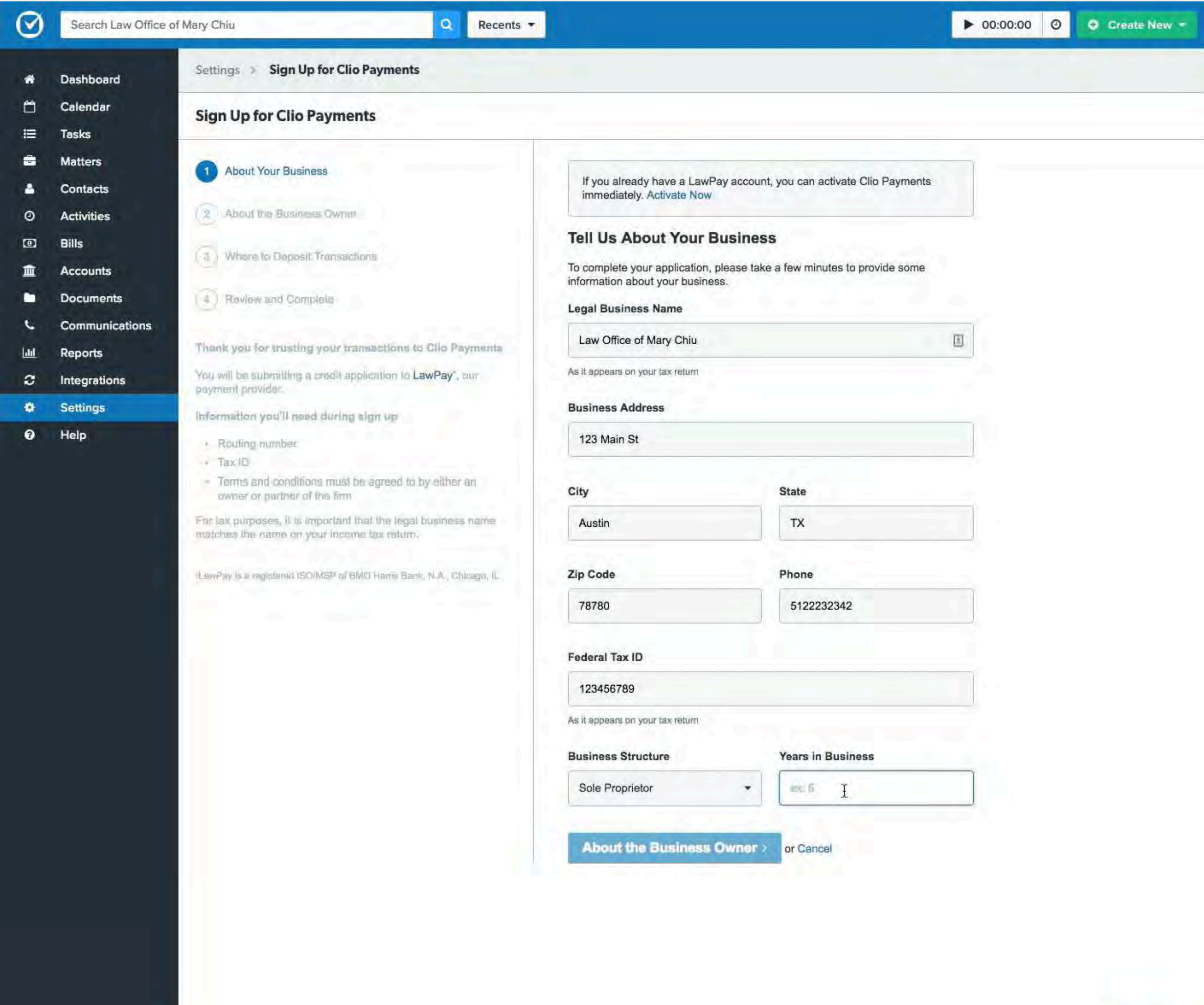
Context

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

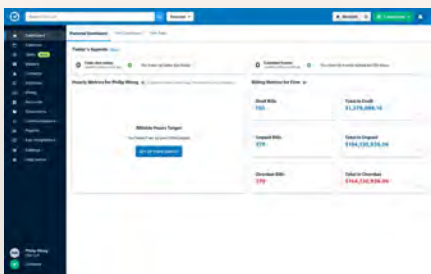
Only 37% of eligible customers were using Clio Payments. Adoption was a key barrier to delivering value



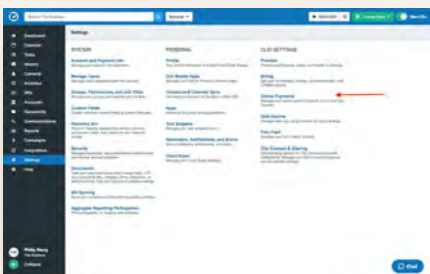
Discovery

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

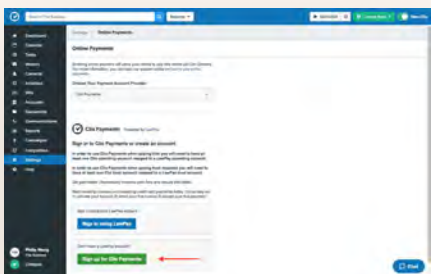
The current activation flow



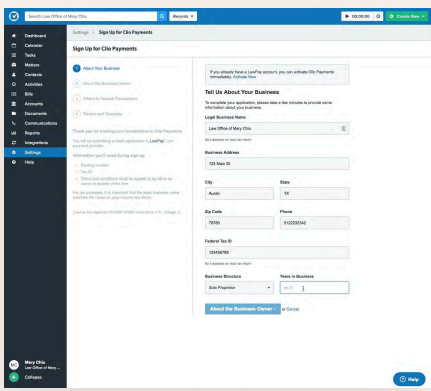
Step 1:
Clio home screen



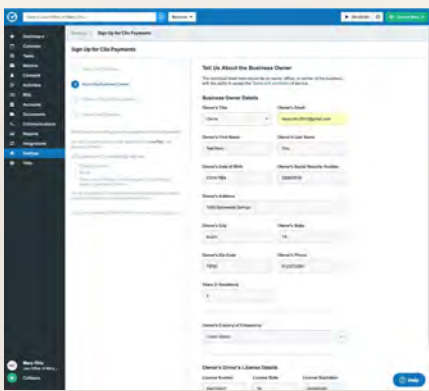
Step 2:
Settings page



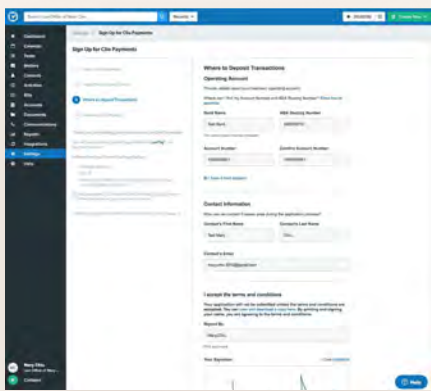
Step 3:
Clio Payments set up page



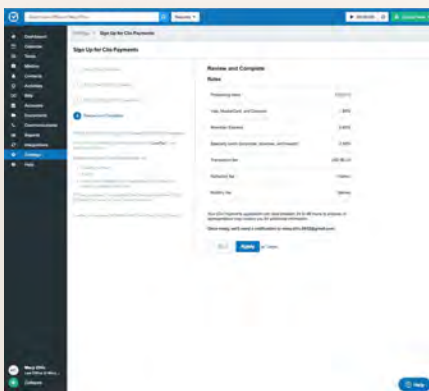
Step 4:
Fill in business info



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



Payments

Powered by LawPay

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

Snyder & Snyder Attorneys at 123456789

No special characters allowed.

Business structure required Years in business required

Sole Proprietor 4

Business phone required

732-953-8876

Please enter exactly 10 digits.

Business address required

This field is required.

City required State required Zip Code required

--sele... ▼

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%

Completion by 8 participants

12.4 mins

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 web application interface for 'Sign Up for Clio Payments'. The top navigation bar includes a search bar, a 'Recents' dropdown, a timer, and a 'Create New' button. A sidebar on the left lists various app features. The main content area is titled 'Sign Up for Clio Payments' and contains a progress indicator with four steps: '1 About Your Business', '2 About the Business Owner', '3 Where to Deposit Transactions', and '4 Review and Complete'. The first step is active. Below the progress indicator, there is a message: 'If you already have a LawPay account, you can activate Clio Payments immediately. [Activate Now](#)'. The main form section is titled 'Tell Us About Your Business' and includes instructions: 'To complete your application, please take a few minutes to provide some information about your business.' The form fields include: 'Legal Business Name' (filled with 'Law Office of Mary Chiu'), 'Business Address' (filled with '123 Main St'), 'City' (filled with 'Austin'), 'State' (filled with 'TX'), 'Zip Code' (filled with '78780'), 'Phone' (filled with '5122232342'), 'Federal Tax ID' (filled with '123456789'), and 'Business Structure' (filled with 'Solo Practitioner'). There is also a 'Years in Business' field.

After

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

The screenshot shows a dedicated screen titled 'Before you proceed'. At the top, there is a yellow banner with an information icon and text: 'Clio Payments is powered by [LawPay](#). This application is a credit check for LawPay to verify your firm and owner's identity.' Below the banner, the main content area is titled 'Before you proceed' and includes 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 also states: 'Have these items ready to submit for credit check:'. There are two columns of required information: 'Firm & owner's information' (including Federal Tax ID, Social Security Number, and Driver's License / Passport) and 'Bank details' (including ABA Routing number and Bank account number). A link '[Where can I find this?](#)' is provided for the bank details. Below the columns, it states: 'This Application may take up to 48 hours to process.' At the bottom, there is a section for 'Already a LawPay user?' with the instruction: '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

About the firm (Step 1 of 4)

Business name – No special characters such as periods or commas (except "&").

Kreiss Law Firm L.

No special characters allowed (Eg. periods or commas).

Years in business
Insert 1 if the firm has been in business for less than a year.

Autofill scenario

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

About the firm (Step 1 of 4)

Business name – No special characters such as periods or commas (except "&").

The Koalaws

Federal tax ID – No hyphens.

Business structure

Sole Proprietor

Impact

Old form performance

New form performance

45% bounce rate



23% bounce rate -22

25% completed in 10 mins



51% completed in 10 mins +26

43% completed in 20 mins

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%

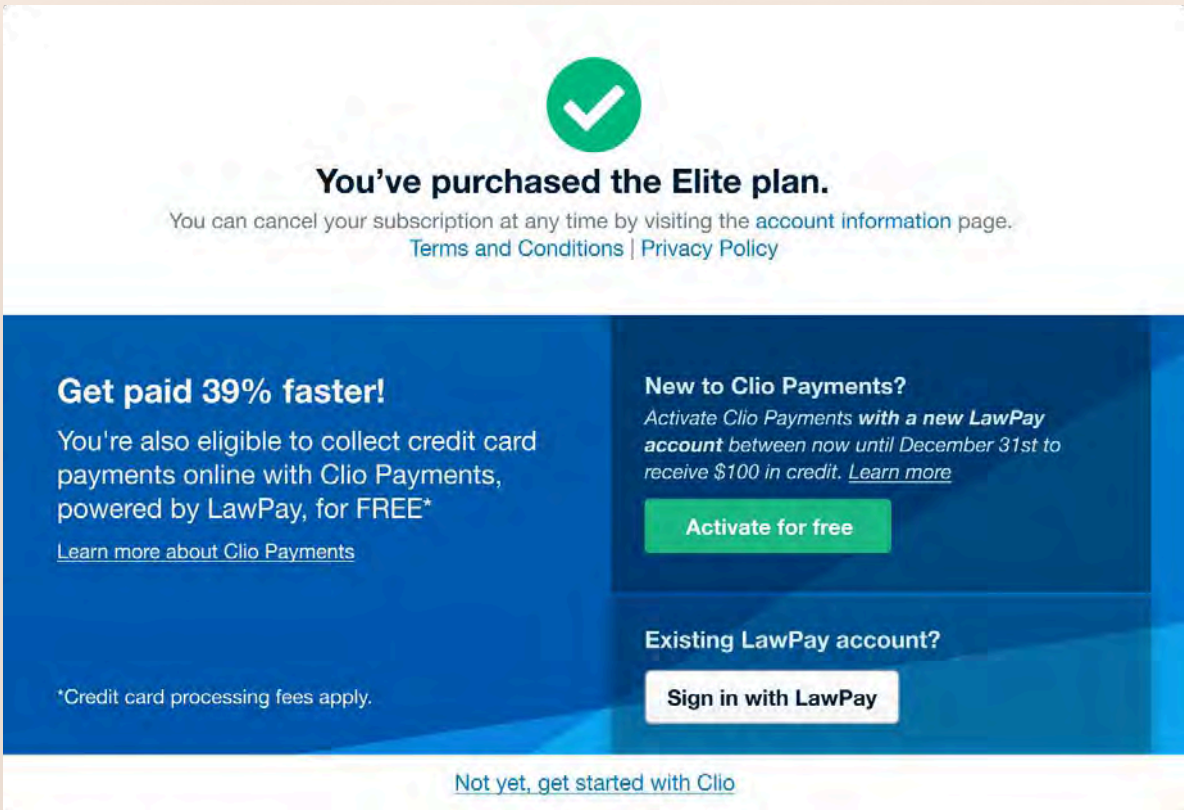
Activation rate

Next step

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

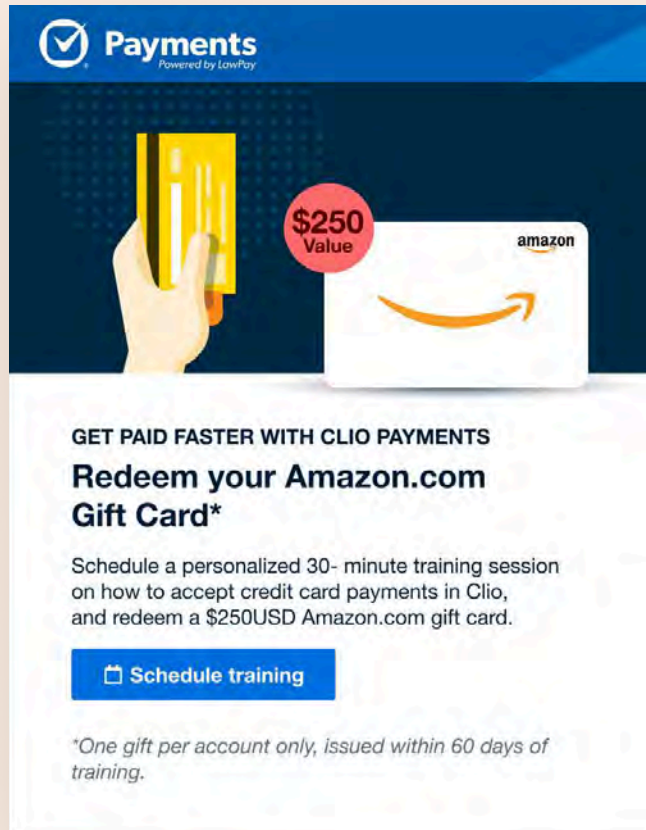
New Clio Customers awareness

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



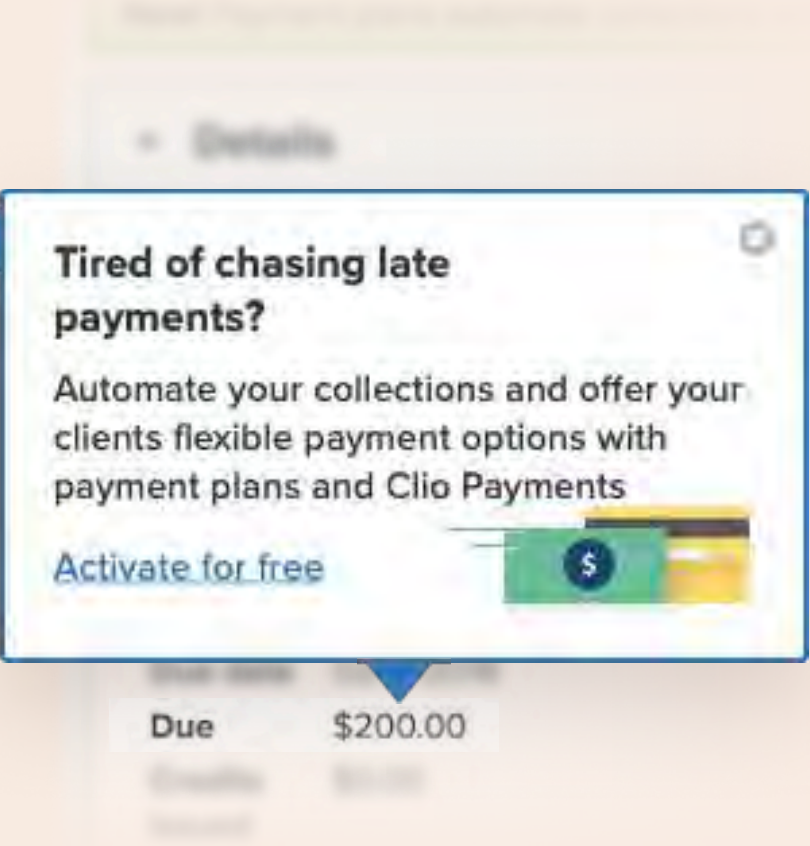
Incentive offers

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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