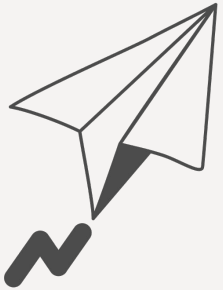
How We Achieved a 38% Engagement Uplift by Transforming a Simple Chat Launcher into an Intelligent Conversation Starter.

Problem Statement
The initial touchpoint with the AI Chatbot presented an unguided experience for end-users. They were unaware they were interacting with an intelligent agent and, without proactive guidance, struggled to frame their questions. This friction often led them to abandon the chat in favor of manual self-service, completely defeating the purpose of the tool.



Role
Lead Product Designer

Key Achievement: Improved end user engagement by 38% and drove feature adoption by 28%

OVERVIEW

HubSpot (Live Chat)

Challenge

Designing for Contextual Engagement, Not Personalization (V1): A primary challenge for the Beta was that our recommendation engine could only generate prompts based on the user's current page, not their individual chat history or user profile. This created our core design challenge: **How could we make these contextual prompts feel relevant and intelligent enough to be genuinely useful, drive engagement, and build user trust in the AI's capabilities from day one?**

Team

Sr. Product Designer (Myself), Product Manager, BE engineers, FE engineers

Scope/Constraints

To validate our core hypothesis, the scope for the V1 was intentionally focused on delivering **contextual** prompt recommendations. This meant the AI would provide suggestions based on the **specific page a user is on**. Deeper **personalization,** which would leverage individual user history, was explicitly defined as **out of scope for the initial release** to ensure we could first prove the fundamental **value of a guided, proactive confidence building** experience.

Discovery

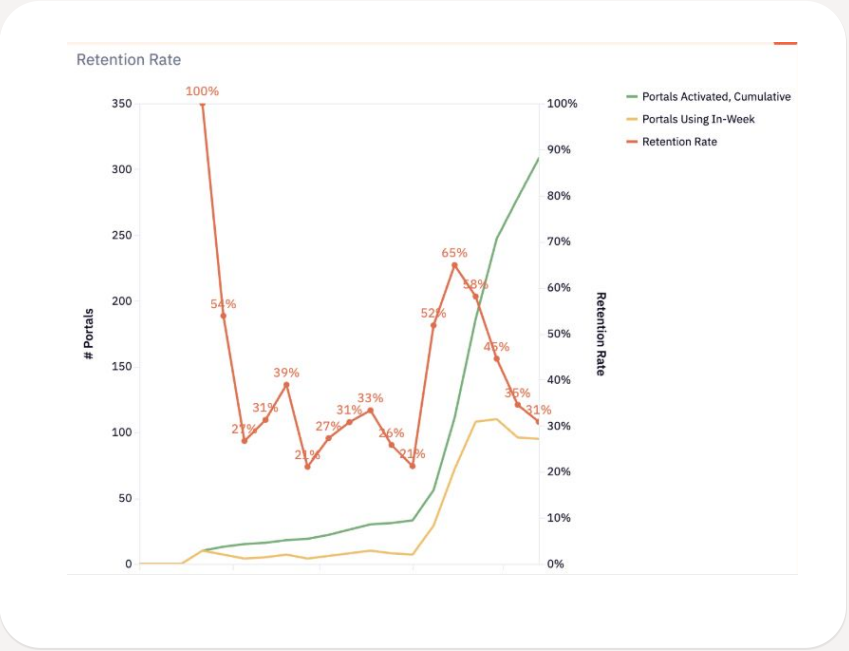
RESEARCH

Quantitative Analysis

Collaboration: PM

Our design process began with a quantitative analysis to establish a baseline for the AI Agent's performance. The analysis was guided by two key questions:

- **Are customers getting long-term value?** I measured the weekly retention rate for all active chatbot instances to understand if the feature was being used consistently.
- **Where is the biggest opportunity?** By analyzing the retention data, I identified a cohort of customers whose usage had declined, pinpointing the exact group we needed to engage for qualitative feedback to understand the 'why' behind the numbers.



Defining Success

Improved Chatflow Usage and Engagement

RESEARCH

Qualitative Analysis

Collaboration: PM

While the Amplitude data revealed *what* was happening—that our AI agent had **high slowing retention in the number of chats deployed**—we needed to understand the *why*. To uncover the story behind the numbers, I partnered with my Product Manager to launch a qualitative research study.

Using our data analysis, we recruited 8 customers who fit our target profile: **high early adoption and slowing number of chatflows created**. Through these in-depth interviews, our goal was to map their current support workflows, pinpoint specific frustrations, and **validate our core hypotheses for making AI experiences more personal.**

Goals

1. Understand why we were experiencing slowing retention with our AI Agent
2. How can the end-user experience be improved?
3. Where are the opportunities to turn our AI into a fully personalized agent in the manner of human agents?
4. Understand how our AI can build confidence and trust with our customer's end-users

RESEARCH

Synthesize & Share

Collaboration: PM

To synthesize our findings from the 8 user interviews, I **centralized all project documentation**—including the full transcripts and the product requirements document (PRD)—into a Google LLM Notebook. I then leveraged the notebook's **AI capabilities to analyze the raw interview data**, which significantly accelerated the process of identifying **recurring patterns** and extracting key quotes.

The resulting themes were then summarized and sent to the product team via Slack to facilitate **rapid discussion and ensure cross-functional alignment** on our key user problems.

Impersonal

“The bot has no awareness of the user's history, status, or recent activity, making the interaction feel cold and inefficient.”

Context

“It treats everyone the same, from a new user to returning user. Users often don’t know where to start or what to ask”

Proactive

“It would be great if our AI was more proactive, allowing our users to quickly get responses to questions.”

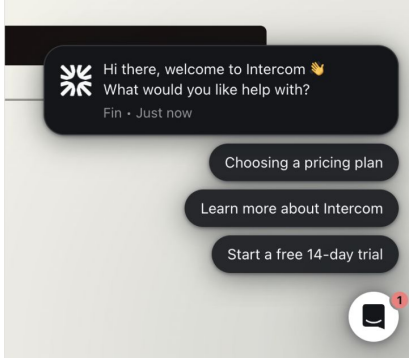
RESEARCH

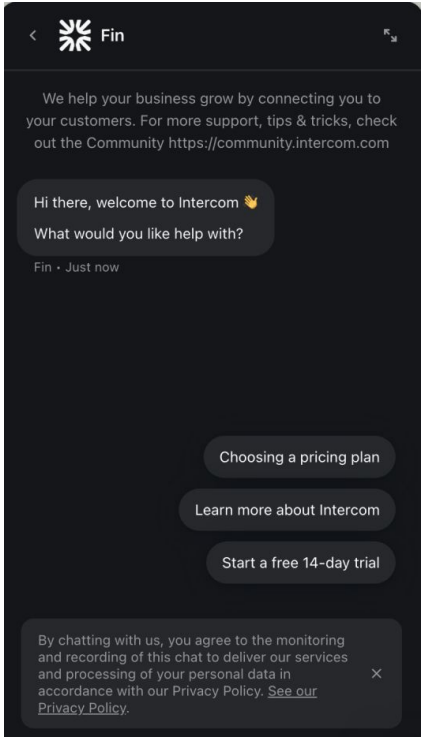
Competitive Analysis

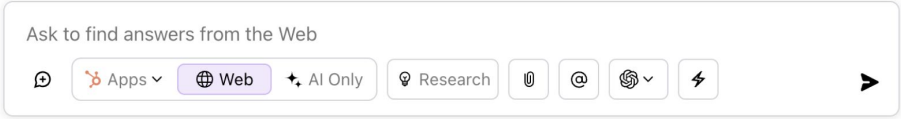
To inform my design strategy and identify opportunities for differentiation, I conducted a competitive analysis of the AI-powered chat landscape. The research focused on how leading products use prompts to drive user engagement. My analysis was guided by two key questions:

- **Prompt Discovery:** How are prompts being surfaced to users, both within the main chat interface and through proactive UI elements?
- **Initial Engagement:** What design patterns are being used in chat launchers to set expectations and encourage the first interaction?

The resulting report, which **synthesized key patterns** and best practices, served as a foundation for my initial design explorations.







DEFINING

WORKSHOP

Collaboration: PM, ENG

To combine our quantitative data, qualitative insights, and competitive analysis into a **single source of truth**, I collaborated with my product and engineering partners.

This **affinity mapping workshop** led to a **shared understanding of our customers' core pain points**, which we formed into our guiding problem statement. This problem statement would help **ground us moving forward in what and who we were solving for**.

DEFINING

PROBLEM STATEMENT

Collaboration: PM, ENG

The initial touchpoint with the AI Agent presented an **unguided experience for end-users**. They were unaware they were interacting with an intelligent agent and, without proactive guidance, **struggled to frame their questions**. This friction often led them to abandon the chat in favor of **manual self-service**, completely defeating the purpose of the tool.

Exploration

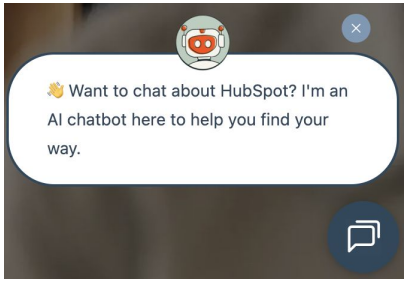
DESIGN

MID-FIS r1

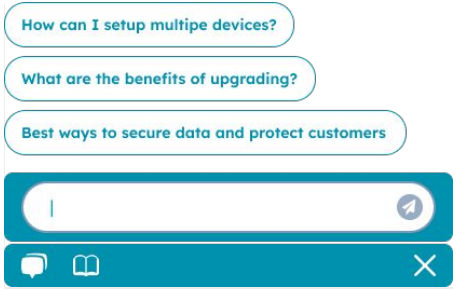
How can we transform the current launcher into a UI that resembles an AI interaction?

My design process began with a **rapid exploration of mid-fidelity** wireframes since some components already existed. The goal was to quickly generate a range of **potential solutions without a premature investment** in any single idea. These initial concepts were then put through two early-stage feedback loops:

- **Design Critiques:** To refine usability and interaction patterns with my design peers.
- **Feasibility Checks:** To ensure the concepts were technically viable with my core engineering partners.



Current



Can we scale this in the future to have a navbar. Potentially opening up additional use cases for users?

DESIGN

TESTING RESULTS

Where we failed 🤔

First round of usability testing focused on validating the core interaction of our V1 launcher concept. While we had made an internal strategic decision to scope the MVP to prompt interactions only, **testing revealed a critical flaw** in how this was communicated in the design:

Key Finding: Expectation Mismatch. The V1 design included a navigation bar with placeholder elements for future capabilities. **End-users consistently misinterpreted these elements, expressing confusion and frustration when they couldn't find expected features like document or image uploads**. This experience was in **direct opposition to our primary goal of building user trust**, teaching us that even well-intentioned hints at future functionality were perceived as a broken or incomplete product.

The Pivot: Based on this clear and powerful feedback, I made the decisive recommendation to remove the navigation bar entirely. I pivoted to a simplified UI that focused exclusively on the core prompt-based interaction, ensuring the V1 experience was honest, intuitive, and perfectly aligned with its actual capabilities."

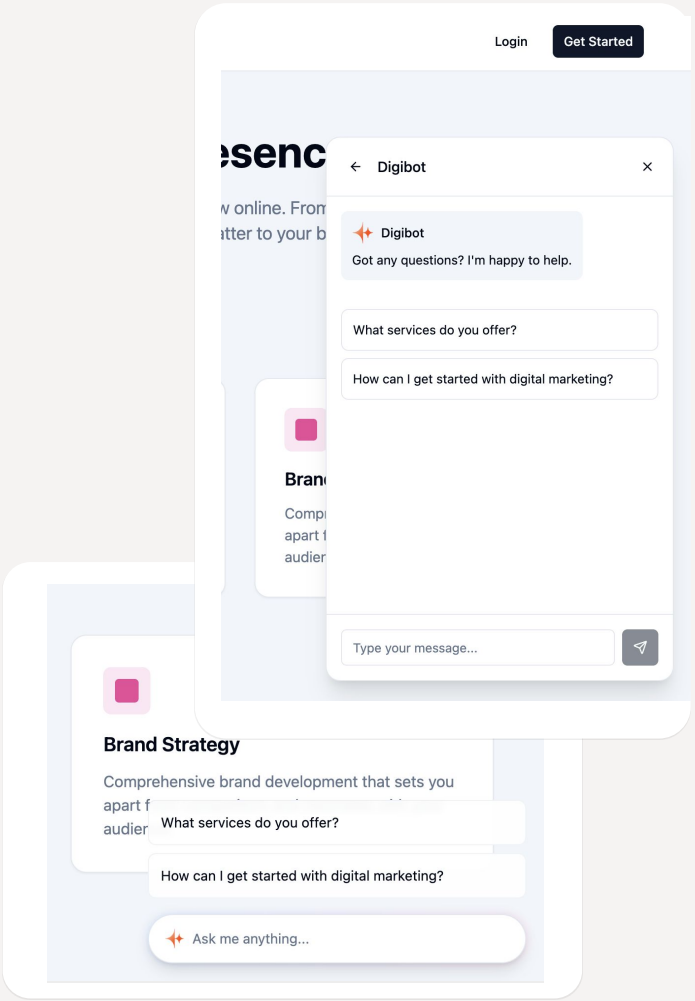
PROTOTYPE

LOVABLE

To accelerate the journey from **research insights to a validated design,** I used **Lovable's AI prototyping** tool to rapidly generate high-fidelity concepts based directly on our **customers' feedback from Round 1 of testing.** These initial prototypes served as the foundation for a two-pronged validation process:

- **Internal Alignment:** First, I ran iterative feedback loops with my product and engineering partners to ensure the designs were technically feasible and aligned with our strategic goals.

- **User Validation:** After incorporating internal feedback, I tested the refined prototypes with a select group of customers—recruited from our quantitative analysis—to ensure our design decisions were grounded in real-world user needs. The prototype was also tested with end-users from Round 1 of testing.



Solution

DESIGN

HI-FIS

With a **validated concept and alignment** from my cross-functional partners, I moved into the high-fidelity design phase. I constructed the detailed user flows and created new UI components by leveraging our established **design system to ensure consistency** and development efficiency. Throughout this process, I worked in close partnership with key stakeholders:

- **With Engineering:** I conducted deep-dive sessions to review the final designs, map out all edge cases, and confirm technical feasibility before development began.

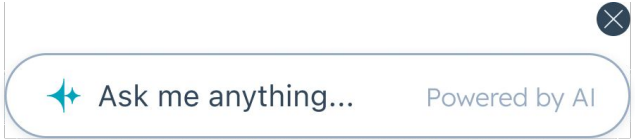
- **With Product/Eng:** I collaborated on defining a phased rollout strategy that would allow us to deliver immediate, tangible value to customers while gathering data to inform future iterations.

LAUNCHER DESIGN

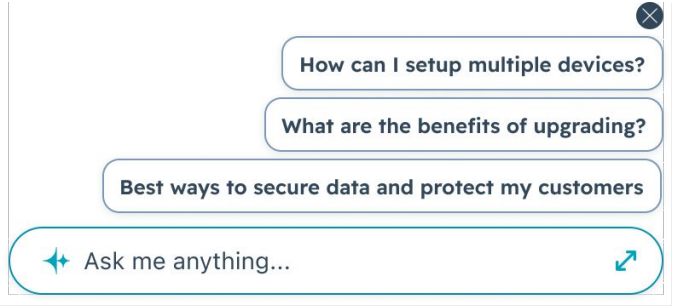
To immediately and intuitively communicate the widget's AI capabilities, I made two key design decisions for the launcher's default state:

1. **Leveraging an Established Mental Model:** I deliberately designed the launcher to resemble a modern AI input field. This instantly taps into a familiar user pattern, setting clear expectations that this is an intelligent, conversational interface—a function further reinforced by the contextual disclaimer text.

2. **Balancing Visibility with Disruption:** To add interactivity without increasing the widget's crowding of our customers' websites, I introduced a subtle hover effect. This provides interaction feedback while respecting the customer's page layout, only expanding upon clear user intent to engage.



Offer clear visual indicators of AI capability through input interface, copy to ask anything, and AI disclaimer.



Created hover effect on desktop when user shows intent for help. Offer contextual prompts to guide users confidently in the capabilities.

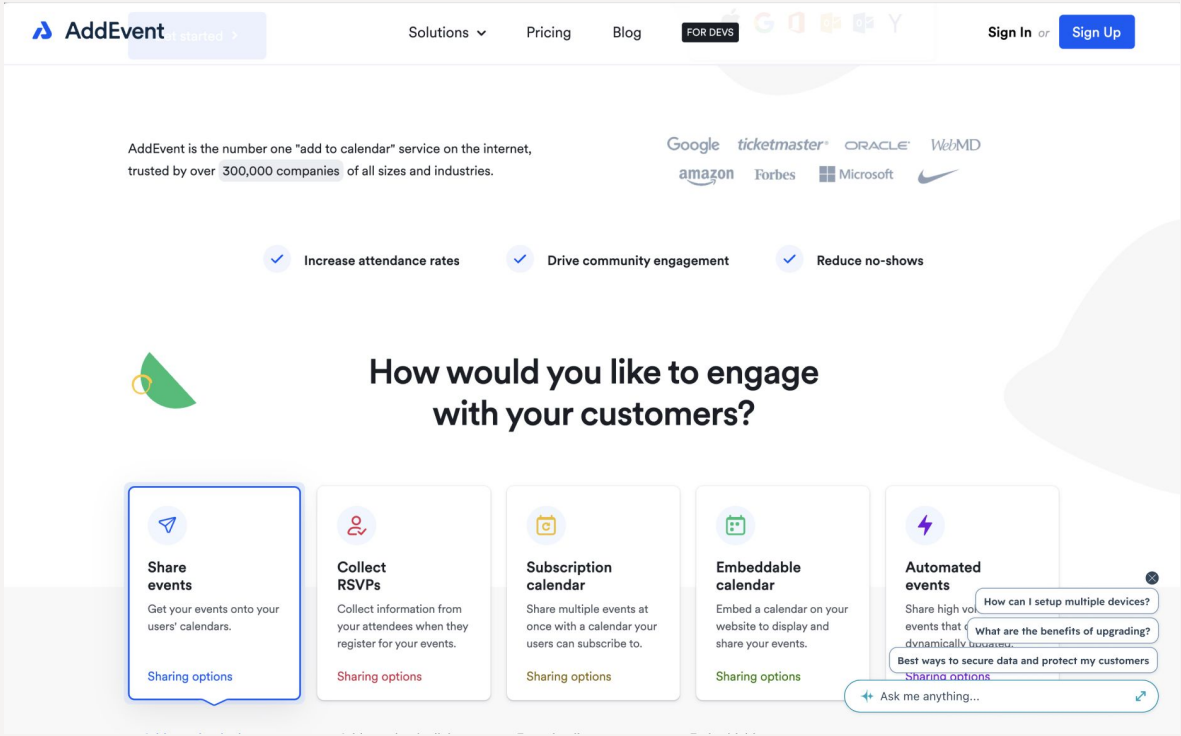
DESIGN TRADEOFF (TYPEABLE INPUT)

A critical decision in the high-fidelity stage was how to handle the initial interaction.

After prototyping two versions—one with a typeable input field and one with the input as a button—we chose the button approach for the V1.

This decision was based on our goal to **maximize user guidance** and reduce the 'blank slate' problem, even though it meant **deprioritizing** freeform input until a later release. This **strategic trade-off** allowed us to deliver value faster and **validate our core hypothesis**.

V1 Tradeoff. Table typing inside of the input. Would this reduce confidence in the AI for end-users?



DESIGN TRADEOFF (INLINE PROMPTS)

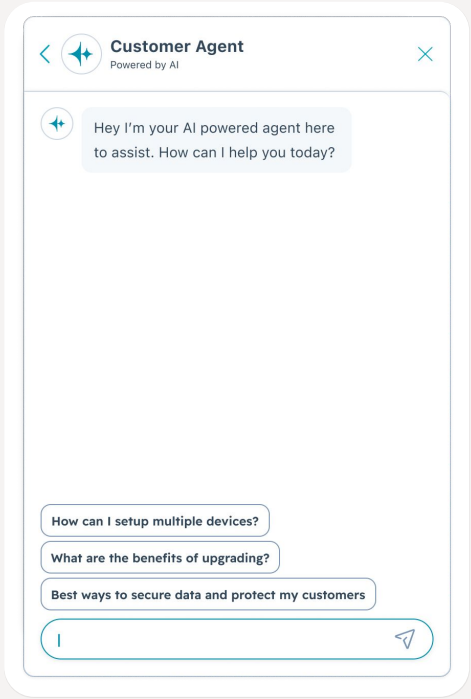
A key decision during the high-fidelity phase was to house the prompt recommendations *within the expanded chat widget* itself, rather than limiting them to the initial launcher. This choice was made specifically to **address edge cases and provide a more robust, scalable user experience**.

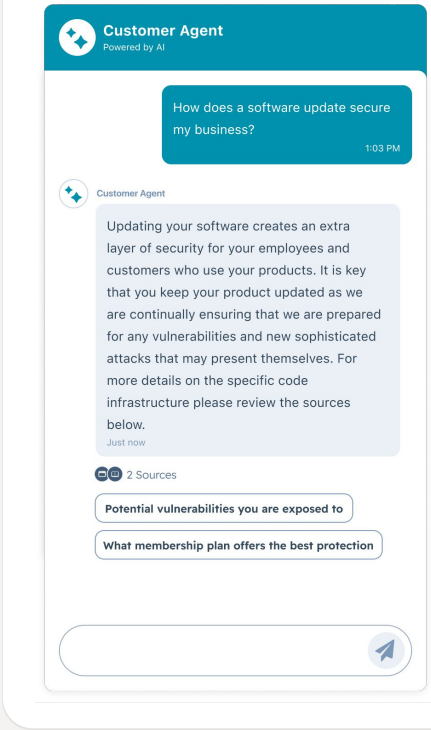
This approach established a new interaction pattern with two critical benefits:

1. **Immediate Scalability:** It handles scenarios requiring longer or more numerous prompts, which would have broken a launcher-only UI.

2. **Future-Proofing:** It provides the foundational framework for my long-term vision, including more granular targeting and, contextual 'smart replies' that can be displayed inline with the AI's conversation in future releases.

V1 Tradeoff. Short term limited personalization and guidance





DESIGN

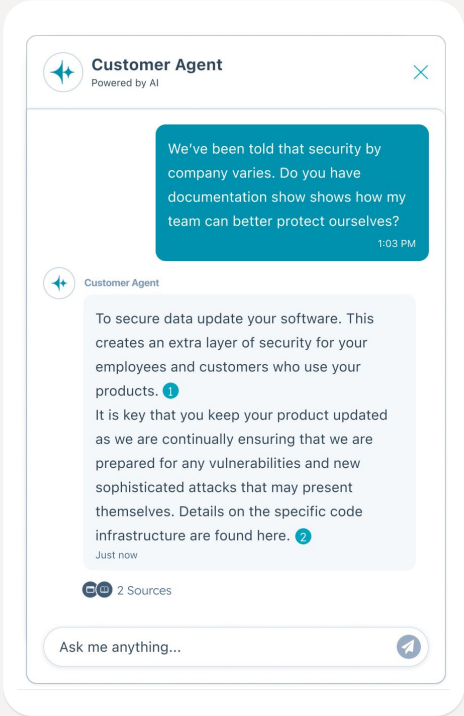
Improving End-Users Trust & Confidence

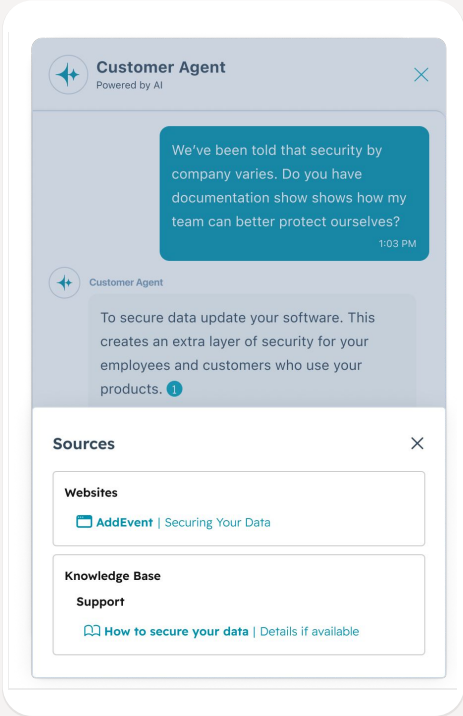
A critical part of this project involved re-designing the source citation display to be more **scalable and user-centric**. Building upon HubSpot's established AI design patterns, I designed a new, compact citation component with a minimal footprint.

This strategic redesign accomplished two key goals:

1. **Enhanced User Trust:** It provides clear, inline source attribution, which is critical for building user confidence and transparency in the AI's responses.

2. **Enabled Future Capabilities:** By optimizing the use of vertical space, this new pattern creates the necessary real estate to introduce our next generation of features, such as contextual 'smart prompts' directly within the conversation flow.





LAUNCH

PRIVATE BETA

Collaboration: PM, ENG

Following the final design handoff and a thorough (VQA) pass with engineering, we launched the private beta. To systematically measure the feature's real-world impact, I partnered with my Product Manager to create a comprehensive research plan for this period. We rolled out the new experience to our pre-selected cohort of customers and established a continuous feedback loop, which included:

- **Weekly Customer Syncs:** To gather qualitative feedback on their experience and their users' engagement levels.

- **Performance Monitoring:** To track our key success metrics and identify any emerging usability issues.

RESULTS

ENGAGEMENT AND USAGE

The private beta delivered immediate, positive results, providing strong validation for our design approach. Within the first two weeks, we observed the following:

- **39% Increase in End-User Engagement:** We measured a 39% lift in conversions and clickthroughs on the new chat launcher, directly addressing our primary goal of increasing user interaction.

- **Deeper Feature Adoption:** We saw a significant increase in the number of **new, page-specific chatflows** being created by our customers by **28%**. This was a critical validation point, confirming our hypothesis that a contextual UI would empower customers to build more targeted experiences.

LEARNINGS

KEY LEARNINGS

The successful beta not only validated our initial design but also showed several key opportunities for future iterations. Our learnings directly informed the next phase of the product roadmap:

1. **Evolve from Context to True Personalization:** The high engagement with page-based targeting confirmed our core hypothesis that users want relevant content. The clear next step is to build on this success by integrating user data (like chat history and CRM data) to deliver truly personalized recommendations.

2. **Increase Customer Control & Configurability:** We identified a strong desire for more granular control. A key opportunity is to enhance the settings UI, allowing customers to configure elements like the welcome message to better suit their engagement strategy.

3. **Explore a Hybrid Interaction Model:** User feedback revealed a split preference for the launcher's core functionality. This presents a clear opportunity to increase customer choice by designing and testing a flexible, configurable model with two distinct modes:
    a. **Direct Input Mode:** An option for a traditional text field in the launcher, allowing users to type freely from the start.
    b. **Prompt-Driven Mode:** The current model, which uses the launcher to display prompts that open the full chat widget, optimized for guided discovery and efficiency.