

# EPISODE 075

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## EXPENSIFY

IN CONVERSATION WITH

Justin Colt, The Collected Works

AND

Shawn Borton and Gabi Horowitz, Expensify

### **INTRODUCTION**

Welcome to The Follow-up, a weekly podcast that goes in depth into projects recently reviewed on Brand New featuring conversations with the designers, and sometimes their clients, uncovering the context, background and design decisions behind the work.

### **ARMIN VIT**

Hi, this is Armin Vit and welcome to the year 2024 as well as to episode number 75 of The Follow-up.

This week we are following up on Expensify, an online financial management platform that helps anyone from small businesses, to startups, to global enterprises manage corporate cards, expense tracking, next-day reimbursement, invoicing, bill pay, and travel booking all in one app. A key selling point for the app is that it offers one-click receipt and expense tracking, allowing people to take a photo of a receipt and letting the app do the rest, this then funnels to finance administrators that provides them with realtime insights into company finances and minimizes expense reports submissions and time spent on those, while also connecting directly to accounting, HR, payroll, and travel software. Headquartered in San Francisco, CA, Expensify has over 100 employees with offices all around the world as more than 12 million people use its free features. The company went public in 2021 and maintains a charitable arm through Expensify.org where every time someone makes a purchase with the Expensify card, it will donate 10% of card revenue to funds that support climate justice, food security, housing equity, reentry services, and youth advocacy.

The project, designed by New York, NY-based The Collected Works in collaboration with Expensify's in-house team was posted on Brand New on November 6, 2023. You can pull it up on your browser at [bit.ly/bnpodcast075](http://bit.ly/bnpodcast075) that is B I T dot L Y slash bnpodcast075, all in lowercase.

This week we are joined by Justin Colt, Co-founder and Chief Creative Officer of The Collected Works; Gabi Horowitz, Head of Marketing & Brand at Expensify; and Shawn Borton, Head of Design at Expensify.

In this conversation we hear about how 30 seconds worth of animation four years ago — during a nearly 4-minute music video as part of Expensify's 2019 Super Bowl commercial — served as the inspiration and spark to rethink their identity. Not just as a design exercise but as an effort to have their great internal culture and personality properly represented externally and for it to shine in their permanent product not just in their temporary campaigns. We get some insight too into the role that Slack played throughout the process, serving as the platform for showing and sharing the work in progress and receiving feedback from a wider employee base at Expensify, which sounds crazy and scary but that allowed The Collected Works and the various collaborators to work in sync as they all got comfortable getting wacky for a vibrant and comprehensive new identity.

Now, let's listen in as Bryony follows up with Justin, Gabi, and Shawn.

**BRYONY GOMEZ-PALACIO**

I'll let the cat out of the bag and share that at UnderConsideration I am also the Head of Accounting and manage all the finances. It is not too complicated seeing how there's only two people spending money on any given day, but the overall idea of having a visually rich and joyful platform to enliven the process and manage the day-to-day sounds... well, quite lovely.

Enter Expensify. Shawn, Gabi, and Justin, welcome to The Follow-Up.

**JUSTIN COLT** Thanks Bryony.

**GABI HOROWITZ** Thank you.

**SHAWN BORTON** Thanks for having us.

**BRYONY** Absolutely my pleasure. If you don't mind introducing yourselves with your name, title, and the company that you're representing.

**SHAWN** I'm Shawn Borton, Head of Design at Expensify. I've been with the company for going on 11 and a half years now. Our design roles at the company are very much a generalist role, so I've had the pleasure of operating on both the product and the brand side of the coin through the years.

**GABI** I'm Gabi Horowitz. Thanks so much for having us. I'm Head of Marketing at Expensify. I've been here about eight years and similar to Shawn also work on everything under the marketing sun, from product, to brand, to everything else.

**JUSTIN** And I'm Justin Colt, I'm a Co-founder of The Collected Works. We're a design studio based in New York City. I guess I'm the Creative Director here as well as the Co-founder and we just passed 10 years as a studio. Excited for that milestone.

**BRYONY** Eight, 10, and 11. Everybody's been on their role for a little while. Nice [laughter]. Now we do have a lot of ground to cover, or at least I want to cover a lot of things. Gabi, if we can take a few minutes to establish the overall mission of Expensify, and what led you and both of your teams to embark on a brand redesign a mere about four years since your last brand evolution.

**GABI** Yeah, so for those who haven't heard of us, Expensify started off as an expense management app. Basically you just take a photo of your receipt using the app and Expensify automates the rest; scanning the receipt, taking in all the information, and then can even automate the expense approval reimbursement, all of the tracking. We have been expanding over the past few years with more features covering all of

back office finance. Other notable feature is the Expensify card, but also working on invoicing and everything else you need to run your entire back office financial systems. I'd say we've been iterating our brand over that entire time. We did a Super Bowl ad about four years ago, so that was our last big brand moment where we did a big brand evolution leading up to that. And since then we've just been learning what works and what doesn't work for us, and making changes as we need to.

And we got to a point where we realized we needed to make some bigger changes. The small changes iteratively wasn't quite cutting it. We wrote down all of the problems with our brand, and all of the problems with our design system. We were kind of operating on a campaign by campaign basis, sort of reinventing the wheel every time we had to do something new, which meant that while each campaign might've looked fine on its own, there wasn't a lot of cohesion between them aside from primary color palette—that was kind of it.

We set out to create a design system that would work for everything we want to do, which is a pretty wide range of use cases. Obviously there's our product, which is the most important, the mobile app. That's the way most people interact with our brand, but we also do things ranging from luxury partner conferences in Italy or Bora Bora, to our conference presence at regular accounting trade shows in Las Vegas, to everything in between. So, we wanted to establish a brand system that would work for everything and that would feel like Expensify no matter where or how you interact with Expensify.

**BRYONY** Tall order.

**GABI** Indeed. [Laughter]

**BRYONY** Justin, how did The Collected Works get involved with this project?

**JUSTIN** It's kind of a funny one Bryony. Shawn and I actually both went to the same undergrad at Penn State University and we were on the same

floor of the same dorm. I think I probably passed Shawn a couple of times in the hall, maybe played ping pong once or twice, so we knew of each other. Way back in 2018 I was looking through my DMs and Shawn hit me up, essentially reached out and said, “Hey, we’re looking for some branding work at Expensify, let me know if you have some time to chat, we can take it from there”. I’m going to be totally honest, I didn’t answer Shawn right away. I feel totally terrible about that, but we were a small studio at the time, just two of us. But Shawn was rather diligent. He emailed again in 2019, said, “not sure if you missed my previous DM, curious if you’re looking for any business, Expensify would like to work with The Collected Works”. Sorry, Shawn, I think I didn’t answer that email either. [Laughter]

Gave me one last bump at the end of 2020. Just following up, I think I did have the courtesy to say I’m sorry Shawn we’re a little bit too small to maybe work with you guys right now, but then fast forward 2022, he did reach out and at this point was after the Super Bowl that Gabi had mentioned. The Super Bowl commercial that they created was just so vibrant, and weird, and exciting and it really felt like, okay, Expensify has more to prove and Expensify has a life and sort of a personality that feels exciting for us to join. The studio was a little bit larger at that point and eventually answered one of Shawn’s emails with a thousand apologies for ghosting him for so long and said, “Hey, let’s chat. Let’s see what we want to do together”. That’s kind of how it got kicked off.

**SHAWN** Diligently reaching out is a very nice way to put it Justin, thank you for that. We very much had this relationship where we knew of each other but we didn’t know each other, but at the time it was very common where you met someone on your dorm floor and you just added them to Facebook. We created this lifelong connection through Facebook, I suppose, and then through the years I would see Justin eventually start The Collected Works and start posting some of the studio’s work and it always caught my eye and I just thought, wow, he’s doing some very talented things. Kind of kept that in my back pocket through the years that our journey went on at Expensify in terms of they could be

a potential partner for us and whatever brand journey that we might embark on.

**BRYONY** That's funny and to add to the quiriness, I'm going up to Penn State in April to meet with students.

**SHAWN** Small world.

**GABI** Small world.

**SHAWN** Very nice.

**BRYONY** It's a very small world indeed. In order to get started, Shawn, and maybe Gabi you'll add to this, what were the key directives or parameters that you established as foundation or requirements beyond just this is not working, this is not working, this is not working. How did you put all of that together for Justin?

**SHAWN** We put together a pretty clear brief that was based on a pretty extensive visual design audit that we put together. We were able to identify problems with every pillar of the design system... in terms of our logo situation was a bit confusing, we had this word mark that was standalone with no colors, no icons, but our icon mark version had colors and had a different shape, didn't have a real good headline font, we had these older illustrations, but we tasted these new style of illustrations from the Super Bowl commercial. So we had this very thorough brief and it wasn't so much just saying these are the problems, but also these are potential solutions. We do think that we have a solution to the illustration problem. We have these great illustrations we could use things like that. From there it's very typical at Expensify when you approach any kind of project, not just a design project to write a very full and comprehensive design doc and then we did that as well with this is exactly what we're setting out to solve, this is everything in our path.

We had this very thorough exploration of what we thought we needed, but I would say the bigger overarching goal of this time around was

this need for the brand to really shine in the product. We've done campaigns in the past, but it's not like we're doing campaigns every month or every year, and most people see, feel, and digest Expensify in the product or they use it and they tell their friends, you should go download this thing. So we very much took the approach this time around that the product is the brand, and everything that we were setting ourselves out to do here, we wanted to make sure that it would come through as a really an inspirational brand in the product. That was what we basically put on their plates, The Collected Works in terms of this is what we have for you. Does the sound interesting?

**BRYONY** Gabi, do you want to add anything or are you good?

**GABI** Yeah, I'll add a couple things to that. One is, we set out to say "let's not change things just for the sake of changing them, let's change them to make an improvement, or change them to solve a problem". And so if something really isn't broken, we don't need to change it, but the one piece of our system that we really wanted to lean into were these illustrations that we had only used once for our Super Bowl ad four years ago. We had created a full length music video—four minutes long with 2 Chainz X Adam Scott—and about 30 seconds of that music video is an animated clip that we had partnered with Augenblick [Studios] to create and it was the illustrations from that animated clip that we all just loved.

We had employees requesting to get tattoos using those illustrations [laughter] and we actually made a rule that anyone who gets one of those tattoos can expense it and the company will pay for your tattoo. That was a little bit unusual because it's not like that was a core part of our brand. It was something we had done once four years ago for 30 seconds. But it stuck in all of our minds as one of the most fun and weird things we'd ever done. When we approached TCW, we said we want to keep these, anything else we do, color fonts, backgrounds, needs to vibe well with the illustrations.

**BRYONY** So that was one of the top priorities. Now Justin, can you walk us through what the first phase of this project was for you and your team? What were their first steps taken? How did you present the first round of creative? Did you come in with one clear idea, with different directions, territories? What was that process?

**JUSTIN** When we first hit the ground running, there was a pretty well articulated design brief put together and it felt like Expensify was totally okay with a little bit of a small iterative change to start with. And so we actually kind of pumped the brakes and said, let's do this: let's get quite aggressive with what this first round of options look like. I sort of want to shake loose any sort of preconceptions of what there's been for the past five-plus-years, what this could look like. Let's keep the illustrations on the table but show, okay, how can these express themselves? They can move in strange ways. We can adjust color and try different layouts that maybe feel more like a risograph execution. We can start to think about how typography feels very, very expressive in how characters and whatnot can support that. Coming to that first presentation was really thinking, let's give four or five different directions of the weird exciting world that Expensify could inhabit in the future... and we are pretty used to this being like a regular keynote presentation or a PDF where a lot of the stakeholders would get in the room and quite early in the process we found out, Hey, Expensify doesn't work like that. They are a team that lives and breathes on Slack.

Whenever there's any client presentation, that is going to be on a Slack channel, and it's not going to be just four or five people, it's going to be a hundred-plus-employees that are going to see the messages, weigh in, give their feedback, talk about what they like, what they hate. It was an incredibly interesting experience. Quite frankly one of those things that felt a little bit daunting at first as to how that would actually play out, but it also really got people excited to see that magnitude of options on the first pass, of think of what this world could be, of open up the aperture of how this design style could express itself.

The other thing too that was slightly interesting was very unsure of the different hierarchies of anyone on the Expensify team. There might've been a person that was there for a couple of weeks weighing in. It might be Shawn and Gabi, it might be David, the CEO that pops on the Slack thread, so interesting design challenge I would say presenting to a client that way.

**BRYONY** But I can see the benefit here of democratizing the process and making it open and accessible to everybody. Shawn and Gabi, what was the overall impression of this first round? And how did you get that feedback and collect it in order to have Justin and his team move forward to the next phase?

**SHAWN** To Justin's point about coming out swinging, I remember Gabi and I nudging TCW to basically do that. Sure, we have this very concise brief, but don't be afraid to just really flex on us here. We thought that'd be a very good trust building exercise too, not only for our company to be able to see what this new design system could possibly look like, but just to establish trust that wow, we really picked the right partner in The Collected Works in terms of their capabilities of both understanding what we're looking for, but also delivering so much more and opening different windows that we weren't even thinking about. It was a huge success that very first round. It got a lot of excitement, a lot of engagement, really helped explore different things that were like, cool, that's super interesting. Let's keep that on the table. Things that looked very cool but didn't quite feel right for the brand, so I think we just were able to cover so much ground across a variety of different places that first round that it was definitely a huge hit.

**BRYONY** What would be the item that you think changed the least moving forward from there?

**SHAWN** We saw a lot of interesting compositions or blends of different textures and different treatments and things like that. We started to gravitate more towards a minimal style, we'll call it, because we started to see these illustrations in use. We started to realize these illustrations

are really cool, but there's a lot going on, and when you add these illustrations plus a lot of textures, plus a lot of different compositional treatments, you kind of start getting these quite busy designs and they certainly didn't translate as well to product designs we would've hoped, and that was a big test in that first round as well. That set the tone for understanding maybe the limitations of some of these in terms of how we mix and match some of these ingredients because we did have this very zany wild illustration style as the anchor.

**JUSTIN** I think that's also by design. It's always interesting if you want to get a client to a three, maybe you turn up design executions to a five for some of those, so even if they phase back a little, you still land safely on a three, which is a big change and a big move in the right direction. Have the sensibility that they maybe reigned us in a little bit, even if we did want to get to a three initially. I do think that came across.

**GABI** There were also a couple specific elements that we did a really wide exploration on. Our word mark and icon mark, and ended up with something very close to what we already had. We really went crazy on the explorations on those to see what all of our options would be, and we didn't find anything that we liked that much more than what we already had. For each of the design elements there was this push and pull of "let's explore everything we can explore", but again, we're not committed to changing it just to change it. If it turns out that what we have is working great, that's a win.

**BRYONY** It felt like the logo and the monogram were definitely an evolution, a let's clean this up, let's update it, but let us not compete with everything else that we're doing.

**GABI** Exactly.

**BRYONY** This is the stability, this is what we're bringing from the past into this new era, and then we can go a little bit crazier and push the boundaries on all of the other elements. Which I think was a nice contrast from the outside to see some continuity. It's always a little jarring when

everything changes a lot. It helps with overall balance. Now, in terms of the illustrations, you partnered with Augenblick Studios. What was that process like in the back and forth of concepts and iterations?

**SHAWN** Gabi mentioned we had some employees that wanted tattoos from these illustrations, so we had a little bit of experience working with Augenblick getting illustrations, asking for them. It had been about four years, so we reached back out to them. They were super excited to work on this project and we gave them the same exact thing to TCW in terms of the caveat here is we'd like to do this all in Slack, all the presentations are going to happen in this giant channel with the whole company, we'll compile all the feedback on our end and go from there. And it went great! Their ability to turn around a wide variety of weird and crazy illustrations super quickly was definitely a big part of the success of this project. It was really cool. Every Friday we had presentations happening on both TCW side as well Augenblick side. I would say at one point felt like it was humming along and going smoothly, and each week we were seeing a lot of new material, new content that we knew would make into the final design system.

**BRYONY** You mentioned week-to-week, about how long was the process from when you started working on your brief to final assets? Just to get an idea.

**SHAWN** It's hard to say exactly when the start and finish would be. I believe we started May of 2022 and felt like we had the design system figured out by the end of that year, for sure. Moving on to implementation details was of its own beast. We probably set out to be originally like a three month sprint in terms of really figuring out the pillars and then things came after that in terms of like, cool, we feel really good about this illustration style we've developed and now we've identified functional needs for, okay, we have certain pages and certain flows in the app and we need these particular illustrations, but in terms of getting the basics down, those first, let's call it three to five months were super

intense, but we came away from it feeling like we know what we look like now.

**BRYONY** And in that process you also customized some typefaces, correct?

**SHAWN** Correct. That was super fun. We got to work with Miles Newlyn from Newlyn and Mark and Dana from CoType [Foundry]. We were previously using GT America as the overall brand font, and as much as we loved it and loved that it was a super family, it just wasn't quite working for us in the product. Maybe one of its strengths is that it's so clean, but as that translates to a product, you lose a little bit of its character, we'll call it.

We knew we wanted a product font, something that would be a real workhorse for us and work really well for us across a variety of product situations. We also knew we needed a headline font, something that could balance well with the zaniness of the illustrations and that's where Newlyn came in with our own cut of Expensify New Kansas. I think at the beginning of this project, we didn't know that we would go down the path of having truly bespoke custom typefaces, but I'm really glad in the end we were able to get our own. Having Expensify Neue as the main brand font we get to design with. In harmony with one another, they definitely have that push and pull at the end of the spectrum between very functional utilitarian versus, can get very zany and very, very expressive. Much like working with Augenblick and TCW is a similar thing with CoType and Newlyn where we were kind of able to do everything asynchronously. They would present some work and we could tell them, here's some adjustments we want to make, and it just seemed to run smoothly.

**BRYONY** Anybody wanting to tattoo the typefaces?

**GABI** Oooh, not yet!

**SHAWN** We technically have an employee who has in our Expensify New Kansas headline font, not sure exactly the phrase that he got tattooed, but he did use that typeface to get something tattooed. John Schuster.

**GABI** Wow, amazing.

**BRYONY** I was not expecting a yes! [Laughter]

**SHAWN** It was that good.

**BRYONY** And Gabi, how are you finding the accessibility and application of these bespoke typefaces?

**GABI** It's been great. No complaints. Part of what we wanted out of this project was a design system that could flex as much as Expensify does. We're kind of notorious for doing weird things and not always staying within the expected lane, and so far every single application we've had has worked great. One example, we have a nonprofit arm [expensify.org](https://expensify.org) and we wanted to use all the same core elements from the daily Expensify. And on [expensify.org](https://expensify.org), we might be talking about some pretty serious stuff, whereas in the regular Expensify app we might be talking about some pretty fun stuff. We also speak to a really wide variety of users. We market to everybody, because anybody can download and use Expensify, and then ask their manager to use it. Basically the submitter is in charge of how they want to track receipts rather than only selling to a CFO or a finance admin. But we also have CFOs and finance admins.

That crowd is much more serious and doesn't always want wacky illustrations in their financial workflows. Whereas the end user crowd of people who just need to track receipts, submit an expense report, get paid back, they're all about the illustrations. Being able to turn up and down the volume on how weird and wacky, and how much personality versus how much clarity and straightforwardness, and I'm just here to get the job done has been really amazing to see. That our fonts work so well across the board for all those different use cases and also all of the other design elements fit into that as well.

**BRYONY** Justin, as the team that was overseeing and coming up with all of the different parts but also outsourcing to different teams, what was the process like for you to be... typefaces happening on one side, illustrations happening on the other, icons happening on another, and you're a bit of the gatekeeper, but at the same time an observer. What was that role like?

**JUSTIN** It was actually a real testament to the Slack ecosystem in that sense of, typically I'm used to making a lot of those decisions internally as a studio, and we overthink how things are going to come together. We really package up these different ideas into different conceptual directions, and we get on the call, we're nervous to present. Sometimes it goes well, sometimes it doesn't. But with the super fluid natural process of Slack, it really felt like it was just coming together organically. We could all be inspired by each other. We could look at the Augenblick illustrations and notice a nice line quality of a rounded line, a softness to those illustrations, and we could take that feedback and go back to some of our type creators and say, "Hey, let's round out some terminals, let's make this feel a little bit more approachable around the edges". We could see some wacky moving animations from Augenblick and then apply that to some animations for how type would appear or disappear...

**BRYONY** And so it was just something so organic about the process that created this kind of magical system, and I think that would not have happened and not everything would dovetail as nicely as it did, if it did feel like we were all in different silos. Augenblick working on their thing, we don't hear from them for a few months, us working on our parts of it, not hearing from us for a month, and then trying to shoehorn those all together at the end. I don't know. I mean I don't think the Slack environment will work for everyone certainly, but Expensify being that part of their culture really was conducive to a nice product across the board for all these parts coming together.

Shawn, was there a particular element or asset that was developed that you were most excited about in terms of its impact once it was implemented?

**SHAWN** That's a tough one. That's like picking your favorite child. I think for me it's going to be the colors. That was one thing that I felt the pain of the most is being a designer internally at Expensify. Working with our old system day-in and day-out was just this lack of a really wide and expansive color palette. Just made it tough to do anything, tough to really layer colors together, it was tough to do product design. I feel like we just kind of had dreary grays going on for a while. So the existence of these colors and what we did was we kept the colors that we had before this rebrand are blue, yellow, green, pink, tangerine, and ice, and we basically just moved them up and down the spectrum to have lighter and darker shades of them. Created a really nice system where you can layer them intra-column as well as cross-column and get some really cool combinations going on.

But I think where those colors really shine would be say the illustrations being as wild as they are, this color system is the central glue that binds them together. When you see an illustration of a non-human character up against something just like a super functional calculator. Because they're sharing a lot of the same color, DNA, you've, that cohesion that makes them all feel like, ah, okay, they can really stretch it to be super weird but also very functional and it all works together. I think as a designer working on this system now or working with its ingredients, the colors have been so, so fun and nice to work with.

**BRYONY** All right, devil's advocate, Gab. Of this whole process and in a way representing the non-visual group at Expensify and the super trained eye—you mentioned to me earlier that that's what your role was—what did you find the most challenging?

**GABI** Part of my job here, like you said, was to be the untrained eye because we don't just want to design for designers, we want to design a product for everybody. I represented that voice of somebody who cares about design, cares about color, cares about beauty, but have no background in it, no formal training in it. And my job was to just say, how does this look to the lay person?

A big challenge for me was trusting my opinion in that when I was in a room full of really, really amazing designers that I've huge respect for, and being able to bring my own voice to the table and say, "actually, that doesn't look as good as you think it does", or "that other thing looks better than you think it does". Trusting myself in the collaboration, in that process.

**BRYONY** Justin, will you ever Slack again?

**JUSTIN** [Laughter] No, thank you. No, I am kidding. I think it's dependent quite honestly.

**BRYONY** And is there any other part of this process that you are wanting to take forward to other clients or other projects? Something that you learned from this experience that could benefit others?

**JUSTIN** We used to be in the ballpark of really formal rounds of presentations. The contract locked three different rounds of revisions. There was the first round and then there was revisions. There's a second round, a third round, and then we finalized everything, and sent it over. And I think I really did learn about more of a... perhaps generosity, or more of a flexibility of what that cadence looks like. Not being so regimented to the three rounds. If you go after that X amount would be added to the budget.

Smaller check-ins, smaller calls, sharing stuff that's a work in progress and talking through our thoughts as a studio, and seeing if it works, seeing if there's a reaction. Because many, many times we would throw ideas out there and there would be a secondary notion on the

Expensify side. Someone else would pop in with a reference point we've never seen before, and that give-and-take really built something that was much more fascinating than if we only did it as a studio.

One of the best things of running a studio is when there's ideas that are presented and picked that aren't ideas I came up with. It's rather boring when that happens, but it's really exciting when you're seeing that from other team members or from the client side, and so just that natural organic nature of maybe we don't have to be so formal. Maybe it's not the three check-ins and the delivery of the final project. Certainly is something we're adapting to other clients now too.

**BRYONY** That's a really interesting perspective. I had not heard it before as to creating that flexibility. I'll be curious to check in a couple years and see how that's going. [Laughter]

**JUSTIN** Famous last words perhaps, but good so far.

**BRYONY** No, but you might be starting a new chapter for the firm that creates more collaboration [affirmative] and different outcomes in the end.

**JUSTIN** Yeah.

**SHAWN** On our end, we wanted this to feel like TCW was an extension of our team and vice versa. There were some weeks it was cool to see our own team as well as TCW in the same Figma file working on some of the same stuff. It was cool to not have that typical boundary where it's just, "I don't know, we don't know what they're up to, but we assume we'll see it this week or next". Kind of shoulder-to-shoulder here, riffing on each other's ideas, chatting in Figma, how's this feeling? Where can I find this? Stuff like that. It got us to a much better place, but it also made the process way more fulfilling I would say.

**BRYONY** And perhaps especially for the Expensify team, more of a personal investment in the outcome because you are participating every step of the way.

**SHAWN** Absolutely.

**BRYONY** So in the end there's more tattoos. [Laughter]

**GABI** That's the goal!

**BRYONY** I'm all for the tattoos. Gabi and Shawn, what is some of the feedback that you have received now that things are out there from the employees, from the users, from your potential customers inquiring about Expensify, and the different people that interact with it?

**SHAWN** Well, I'd say we survived the Brand New comments, which is good [laughter]. That's always good feedback to hear when you launch a big rebrand, but I'd say it was well received internally for sure. Everything we designed from a product standpoint these days it's just like, wow, that looks really nice. That looks great. It's amazing what you can do when you actually have those ingredients to make the product look as good as it can be. Internally, it was a big hit. We've seen people just more invested in finding and seeing design bugs and reporting them, kind of taking ownership over the product a bit more because they want it to look as good as it can be. From our customers. We seem to be generally good feedback that we heard. I don't think it changed too, too much in our classic expensify.com product, we just have some people write in and ask, "Hey, why is my default avatar picture a fish now all of a sudden?" They quickly learned to love that, but overall I'd say it felt very positive and well received.

**GABI** Maybe I'm just not getting any complaints 'cuase people are too nice, but so far I've only heard positive things, which has been really great. I think one balance that we wanted to strike was to be playful and fun and whimsical, without being childish. Looking like the type of app that you trust with all of your business finances. So far the feedback seems like we nailed that, which has been really fulfilling. Glad we took the risks that we took and also glad that we reigned it in at times when we needed to train it in [laughter].

**BRYONY** That cobra receipt speaks to my soul [laughter] and it's not childish. My kids would probably not understand why... [laughter] it creates that visceral reaction in me—I love that one. If there was a tattoo that would be mine. Personally, for each of you, what was the most satisfying aspect of this particular project?

**SHAWN** When we were doing this project, it was just me and the design team at the time, but we've since grown to three designers internally. And the two very talented designers that we just hired, they both had made comments about being very inspired and excited to work on this new system that they saw and couldn't wait to get their hands on it. And now that I've seen them internally working on this system, it's just really cool to see how much they're enjoying it, and how they are evolving it themselves, and their interpretation of everything. It's very satisfying to see this other generation of designers get to really enjoy the system and take inspiration from it.

**GABI** My primary motivation for this project was that I think Expensify is the coolest company I've ever heard of. We do wild and crazy things. We travel together for one month every year, staying in hostels, working from beaches. We've reinvented the wheel on everything... and you just couldn't tell by looking at our product! Like having an incredible personality and wearing a very bland gray outfit everywhere you go. And I really wanted to externalize that piece of our culture, to find a way for the product and the brand to really represent the creativity that I know exists in Expensify. And for years it felt like a nut that we just couldn't quite crack. We would bring it up in internal conversations and the response would be something along the lines of: tell me how changing our shade of purple was going to increase revenue. To finally get to this point where we could invest the resources, and the time, in changing the shade of purple, where we could make a real business case for why that was necessary, and then seeing it play out and seeing the way that when people see this new branding, it makes sense.

The reaction has mostly been, “oh yeah, that’s Expensify, that outfit fits”. And we’ve seen that especially at the conferences we go to where we see a lot of the same partners year after year, and immediately the new branding just clicked for them. That feeling that we have found a way to match our external personality to our internal personality, and to take a piece of who we are and find a way to reflect that back out into the world, has been so satisfying to get to be a part of and witness.

**JUSTIN** On our side I think there’s two different big satisfying takeaways. First of all, to really feel like we solved the design problem that was presented to us, and the testament to that is every time I open up the shared Figma documents, I see a slew of people that are working with these assets, pulling things that we help to create, starting with templates that we helped to define. Really felt like it’s a system that’s utilized and appreciated, and goes into the world. And that can be one of those things that doesn’t always happen. It looks beautiful in a brand guidelines document, but it’s never actually fully realized, or it’s not really appreciated and utilized internally. Just as far as a system that works, and functions, and answers the design brief—I think that’s really exciting and satisfying for us.

And then the other note really quickly is just as a studio, it’s satisfying, even thinking back to 2018 when Shawn slid into my DMs and asked to work together, we were a studio of two [laughing]. Now being a studio of seven and working with clients at the size of Expensify, in the sense of Expensify believing in us as a studio. There’s just a lot of gratitude for that, and a lot of satisfaction of, that’s the future of the studio and these are the type of people we want to help work with in the future. I just take away a lot about that as well as the studio future looking bright from this experience.

**BRYONY** That’s wonderful. Final question, but two part. One is in a general sense, where do you see this brand evolving in the next five years? And, is there another Super Bowl ad in there?

**SHAWN** I don't think there's another Super Bowl ad in there, but never say no. Who knows what might happen? I do think we have some other fun things up our sleeves where we'd like to dip our toes back into Hollywood, we'll call it. That is the strength of this design system that we have, is that it does feel boundless. The illustrations, the colors, everything that we have now is just so ripe for doing so much more with them. We have all of these silly dreams and conversations about, we could make a Mario map of the illustrations and kind of write the origin story of Receiptville and understand every character in this illustrated universe where they came from. I think it's just been really fun to allow your imagination to be stretched so widely from everything we created.

The evolution will happen immediately, is definitely going to be continued in the product. It's also interesting to think about, previously we always felt we have what we have and we just make the best of that. Now we spend all this time making the ingredients we'll call it, and now we can actually go cook, and make some really cool recipes, and let the dishes evolve over time, and I'm really excited to see where that takes us.

**JUSTIN** We're still very much involved with all the design work at Expensify, so we still have our constant Slack open. We have our constant back and forth. I just know of so many exciting initiatives that are happening, physical initiatives, things that are happening on product side, just grandiose ideas of what the future looks like. Maybe not all I can disclose, but just a lot of ways this design system can flex in the future. Continuing to be involved with that as much as we're helpful I think is quite exciting. And I won't be able to avoid Shawn's DMs in the future, we have too much of a friendship now [laughter].

**BRYONY** And too many Slack channels, and Figma files, and he can attack from everywhere. Gabi, how about for you?

**GABI** When it comes to the Super Bowl, I'd say been there done that. We always want to move on to bigger and better things, and we kind of

went so big with this Super Bowl with our first ad, too hard to top. We do have some other exciting brand moments up our sleeve for the future. I'll leave it at that, and keep the secret, secret [laughter].

**BRYONY** Yeah, no, there's a lot of hints! [Laughter]

**GABI** And my hope for how the brand evolves from here is that... I hope it doesn't have to change that much, and I don't think it will. So far as we've been using it, we've been open to it changing if we stumble upon problems in the system that we created, but we haven't stumbled upon anything so far. I hope that we can maintain this system, evolve it as we need to, as time changes, as trends change, as we get bored, if we ever get bored of anything. But that this can be the core Expensify look moving forward for five years, 10 years, 20 years, and that we become a company known for this, and not known for changing our makeup every two years.

**BRYONY** That is a good goal to have and I think you set up a very clear brief that started with all of the things that were not working, the things that were lacking, all of the issues that you were encountering but had a very clear path set forward in your thinking, and your strategizing as to how you needed to move forward. Even if you didn't have the solutions, or the exact visual, or the process, you knew exactly where you wanted to go and that makes it so much easier for the design team to actually be playful, and creative, and push those boundaries, because they know what you're aiming at so clearly that that allows for a very fluid and creative process where there was a lot of joy I am sure, and a lot of joking around on Slack [laughter]. Definitely made the process so much more enjoyable for everybody that was involved, and I have to set up some calendar reminders or something to check what's happening in a year's time, in a couple of years, see when we're going to have you all back to talk about whatever it is that you're cooking—that sounds very enticing.

**GABI** Can't wait, thank you [laughter].

**BRYONY** Thank you so much for joining me today and for sharing the insight and the look into what might come.

**JUSTIN** Thanks Bryony.

**GABI** Thank you.

**SHAWN** Thank you so much for having us.

**ARMIN** Perhaps the biggest lesson in this episode is to not ignore your social media DMs because you never know when a potential client like Expensify will slide into them. Good thing Shawn was persistent for more than two years! Not all clients are that patient before moving on to your competitor. Aside from that slice of digital etiquette we learned about the potential of Slack as a way to break down the industry's typical working format of designers retreating to their studio for weeks and re-emerging with various rounds of work and having clients simply say yes or no. Another good tip was that if you want a client to land on a design that is a risk level of 3 you first have to show them something that is a risk level of 5 — doesn't always work but it's a viable rule of thumb. Also, surprising, was how many times the subject of a tattoo came up, which isn't always the case but a sign that The Collected Works, Augenblick Studios, CoType, Newlyn, and the Expensify team did something right and now that they have a great set of ingredients, as Shawn said, let Expensify cook!

Today, thanks for listening, until next time, we'll be here, we hope you'll be there.