

INDIANA CABA

Designing for Clarity & Scale



Connecting Growth and Scalability

Process Street's mission is to save teams time by automating repetitive work, helping people focus on meaningful tasks.

I'll walk you through two connected use cases that share one goal: **driving growth and usage.**

Role

Staff Product Designer

Collaboration

VP of Product · Product Managers · Engineering Director · Designers · Engineers

#01

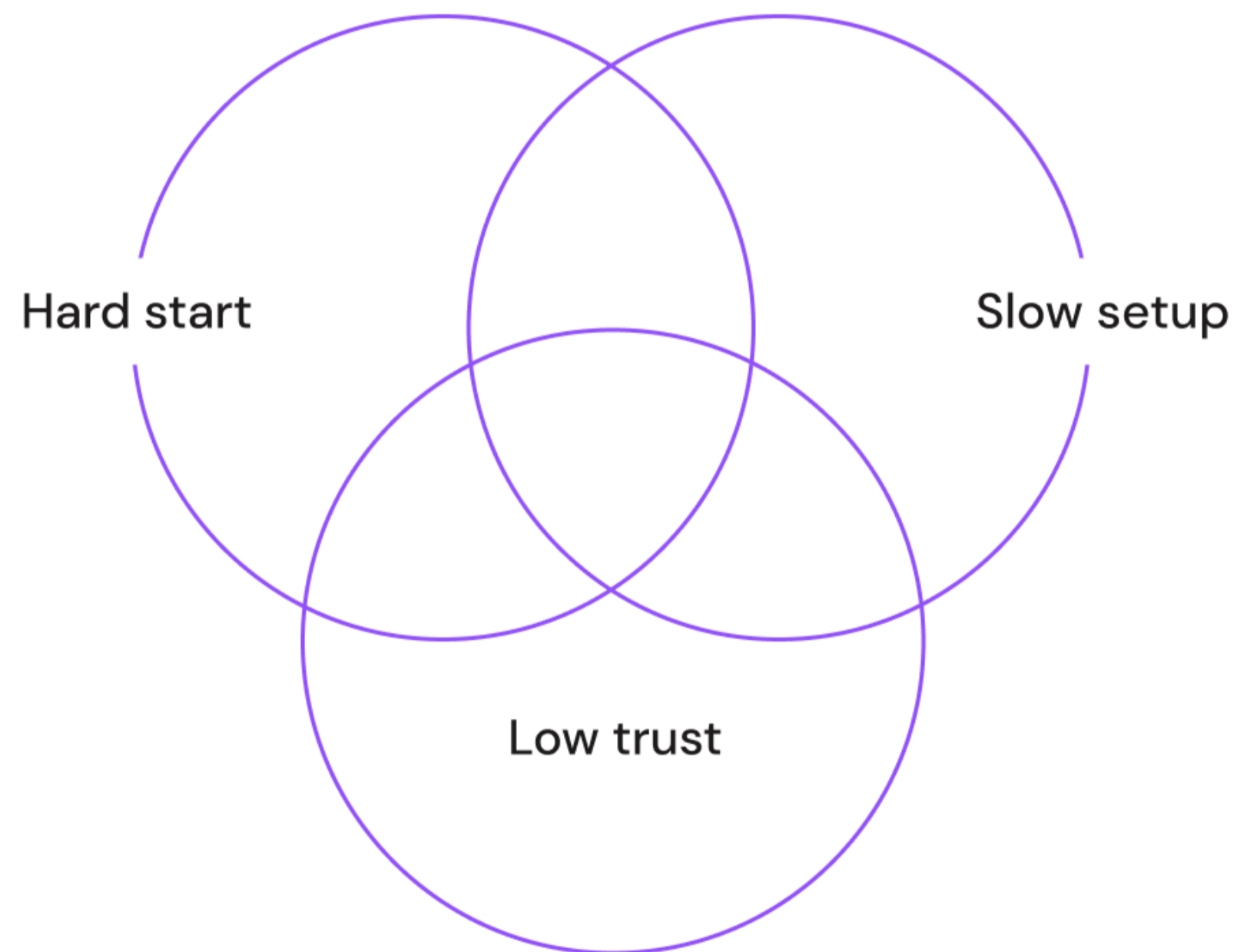
Accelerating Activation with AI-Powered Workflows

New users struggled to reach an “aha moment” because building a workflow from scratch felt overwhelming. Activation lagged as many didn’t know where to start.

How might we
leverage AI to make
setup faster and
onboarding smarter,
without removing
user control?

THE PROBLEM

Growth



Hard start

New users faced a blank page and didn't know what kind of workflow or use case to start with.

Slow setup

Manual creation was time-consuming and confusing for first-timers.

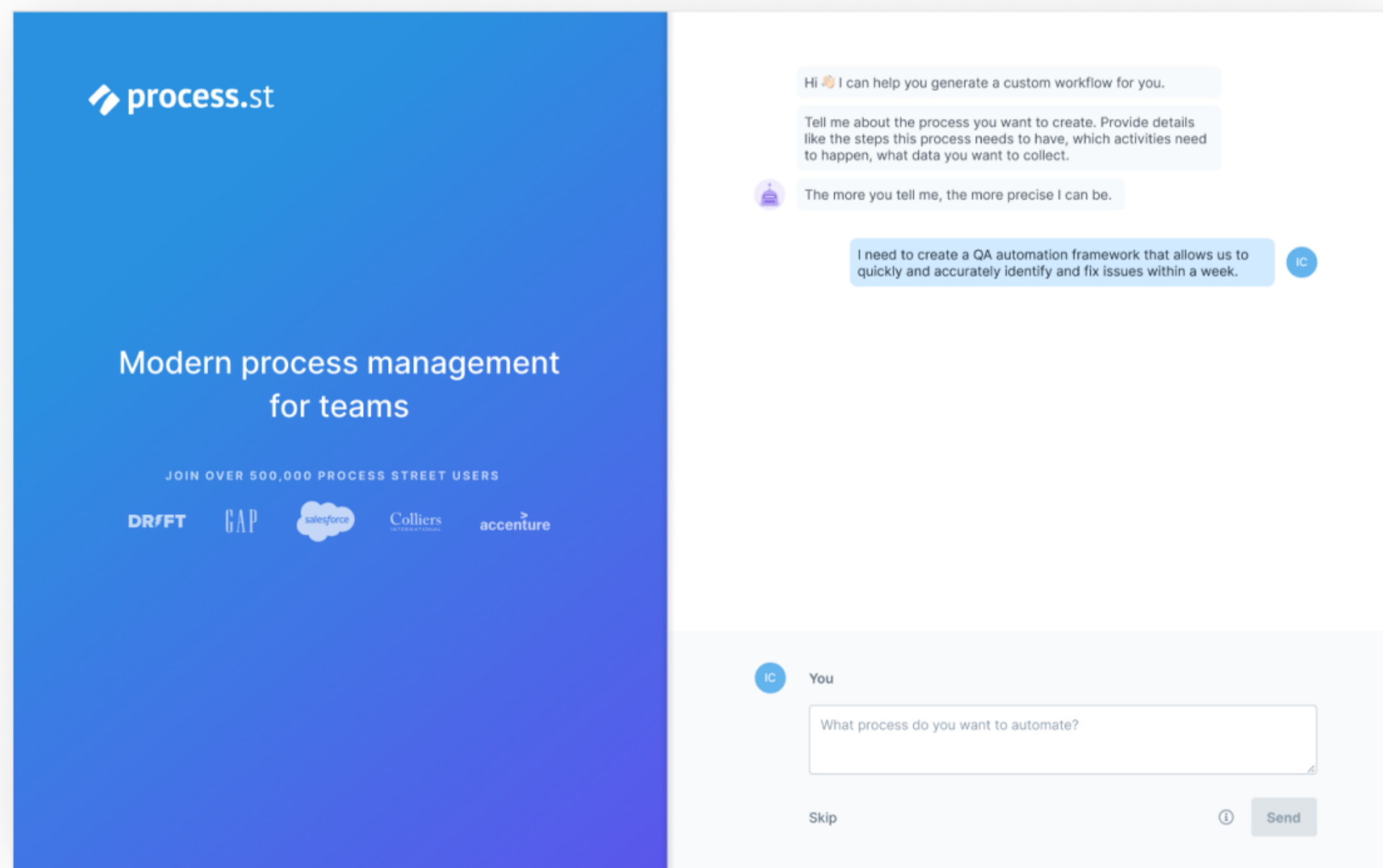
Low trust

Early AI felt opaque; users hesitated to rely on automation.



GOAL

Boost activation and workflow creation by helping users identify the right use case, simplify setup, and build trust in AI.



SOLUTION

AI-Assisted Onboarding

Goal

Guide new users toward value by integrating AI directly into onboarding.

Solution

→ Introduced an **AI onboarding agent** that learns from what users enter during signup, like their role and industry, and uses the same generator logic to create tailored workflows instantly.

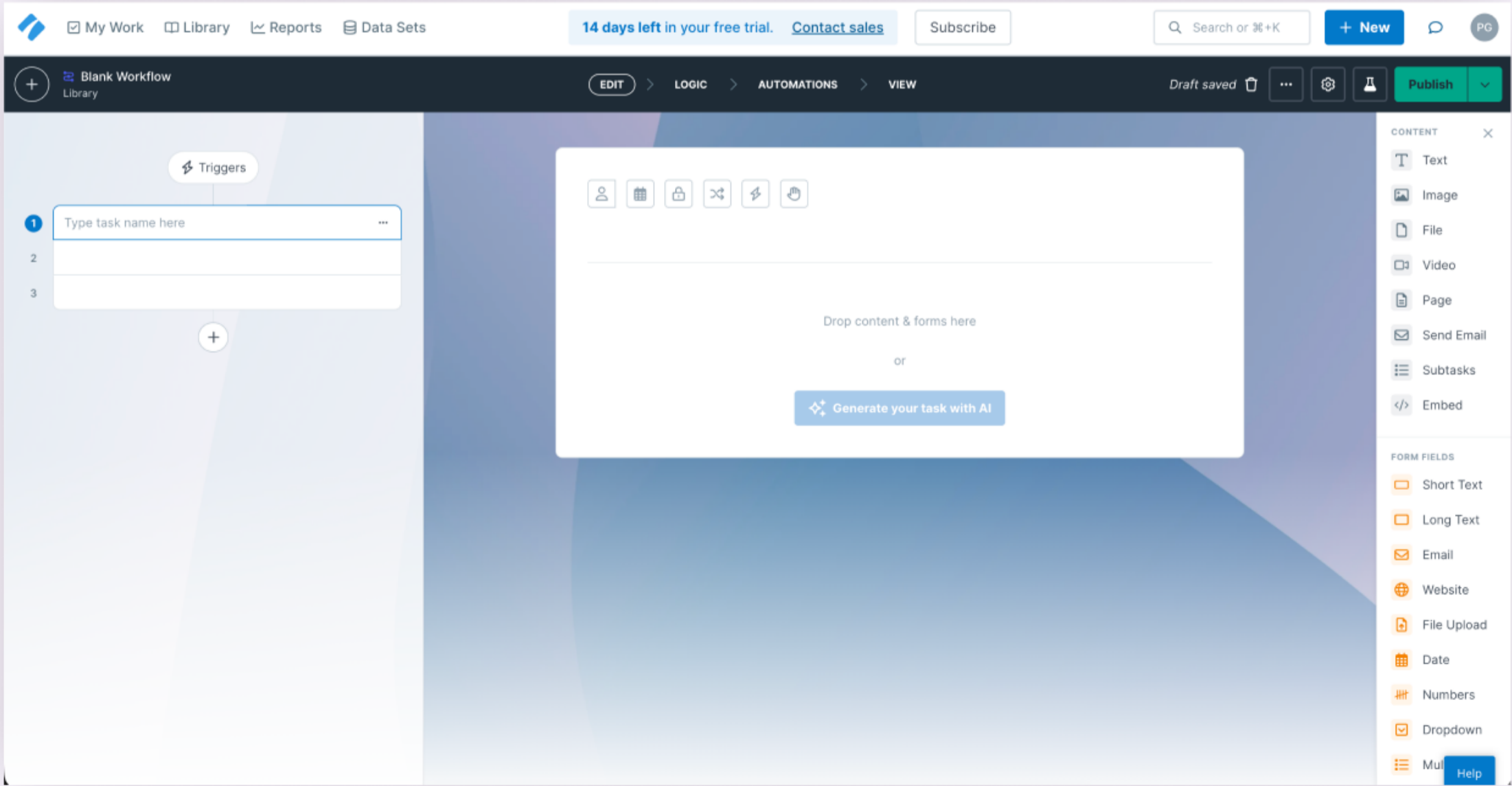
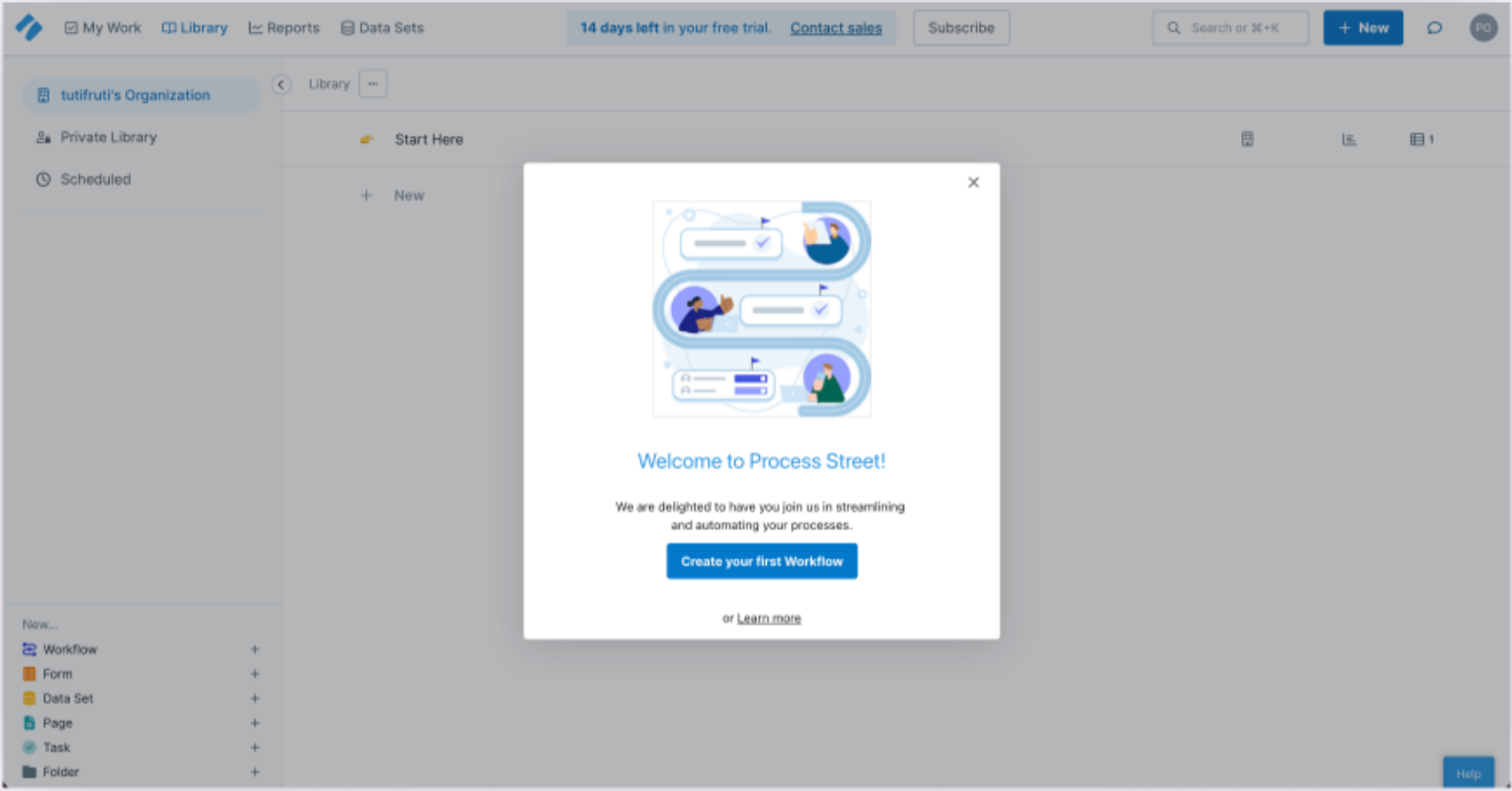
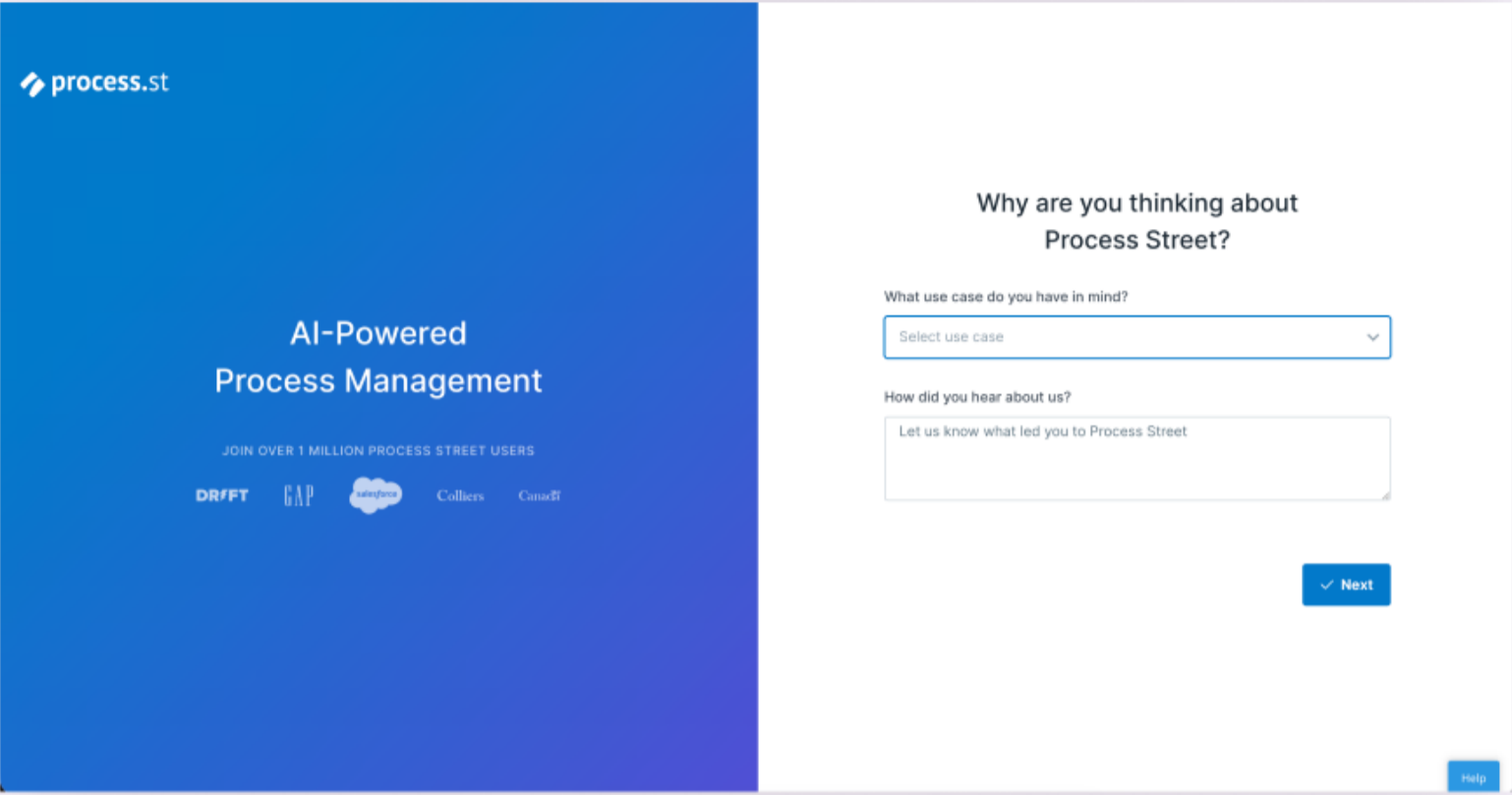
→ Embedded smart defaults and **guided tooltips** to reduce friction and explain AI suggestions.

→ Onboarding became both **personalized** and educational, showing users how to work with AI while building real processes.

Impact

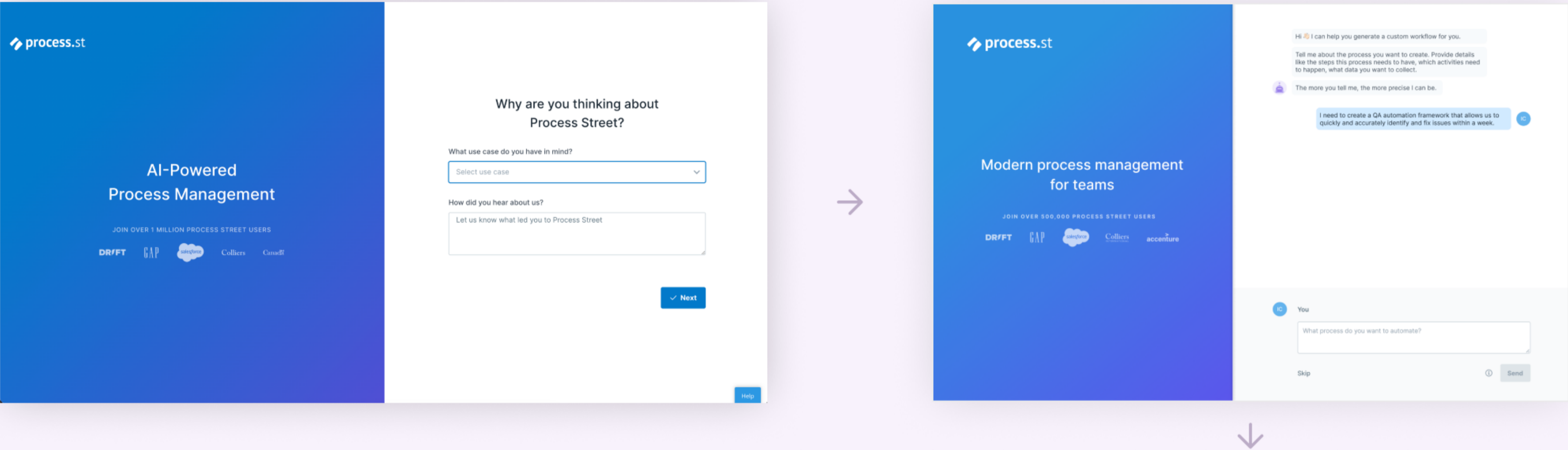
Reduced blank-page anxiety, improved activation, and built early confidence in AI as a helpful collaborator.

ONBOARDING: **BEFORE**

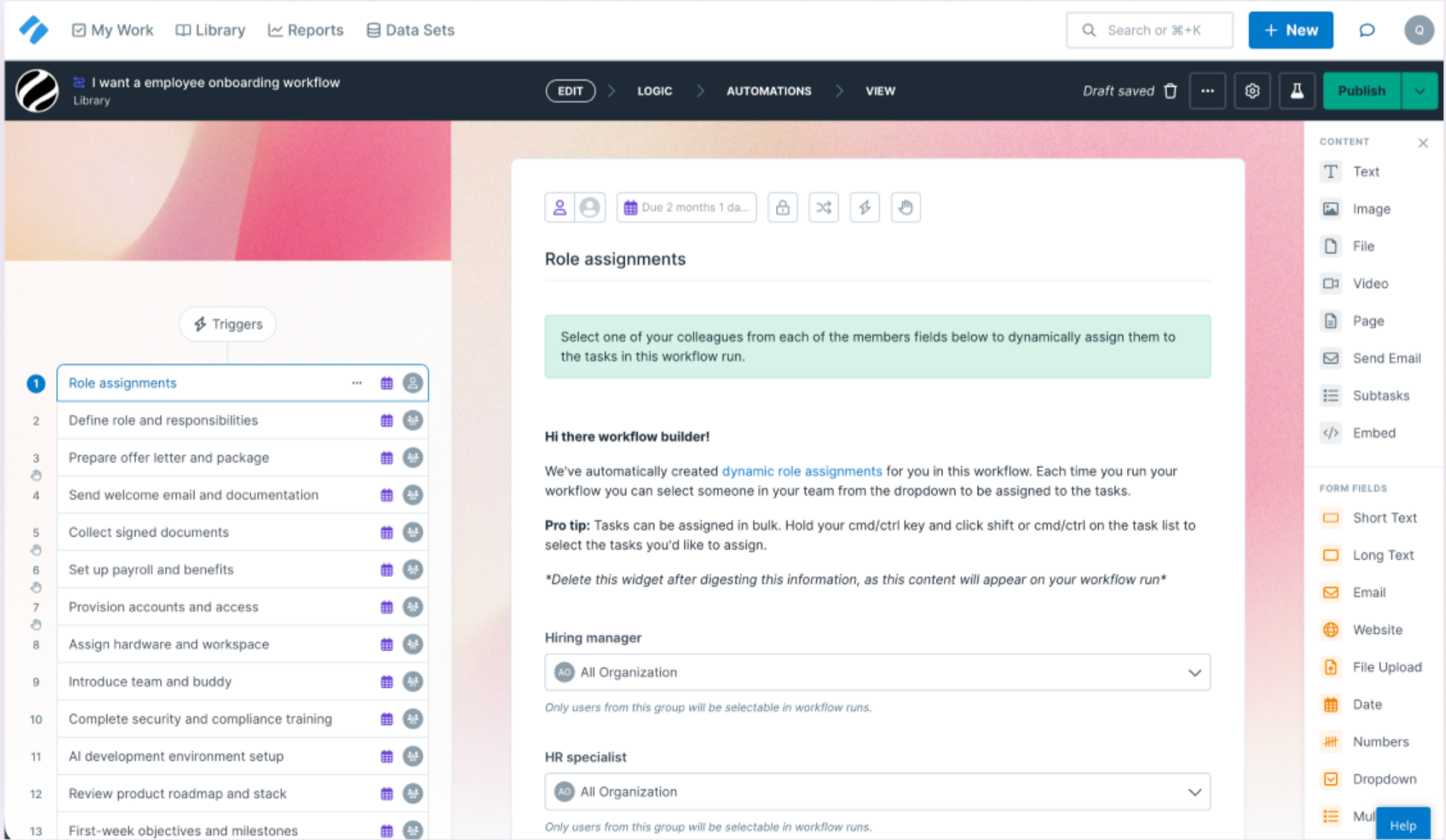


No guidance or 'aha' moment . Users didn't know where to start or how to apply the product to their problem.

ONBOARDING: **AFTER**



After the standard onboarding flow, users landed directly in an AI-generated workflow tailored to their problem, company, and industry. We also added a step-by-step guide to walk them through setup.



SOLUTION

AI Workflow & Task Generator

Goal

Accelerate workflow creation with assistive automation that remains transparent and editable.

Solution

- Built an **AI workflow generator** to turn text input into structured, editable workflows. It included advanced functionality like due dates, automations and assignments.
- Added an **explanation layer** showing why AI suggested each step to build trust.
- Launched an **AI task generator** that creates customized content based on user input, featuring an integrated sandbox for testing.

Impact

Enabled **faster workflow creation** and **quicker time-to-value** for users.

The image displays two overlapping user interface windows. The background window, titled 'Process AI', features a purple header with a robot icon and a close button. Below the header, there is a 'Workflow Name' input field containing the text 'e.g., "Employee Onboarding via Slack"'. A paragraph explains that Process AI generates workflows and provides a 'Learn more' link. An 'ADVANCED SETTINGS' section with a dropdown arrow lists five features: 'Task assignments', 'Due dates', 'Stop tasks', 'Variables', and 'Approvals'. Each feature has a brief description and a toggle switch, all of which are currently turned on. A 'Generate with AI' button is located at the bottom right of this window. The foreground window, titled 'Test AI Task', has a light gray header with a close button. It contains an 'Instructions' tab and a text area with placeholder text: 'Consider the following', 'Topic: {{ADD.VALUE}}', 'Objective: {{ADD.VALUE}}', 'Description: {{ADD.VALUE}}', 'SEO Terms: {{ADD.VALUE}}', 'Target Audience: {{ADD.VALUE}}', and 'Brand Voice: {{ADD.VALUE}}'. Below this text area are two input fields labeled 'Role' and 'Product release', both with placeholder text 'Type placeholder for your variable'. To the right of these fields is a large text area with a robot icon and the instruction 'Fill in the variables fields to generate the AI draft.', containing a 'Generate' button. At the bottom right of the foreground window are 'Cancel' and 'Save' buttons.

RESULTS

Driving Activation Through AI

+18% increase in **new-user activation**

+11% increase in **workflow creation**

+25% faster time-to-first-workflow

✓ Reduced onboarding-related support tickets

AI turned not knowing
where to start into
confident first steps

#02

Redesigning the Inbox for Instant Clarity

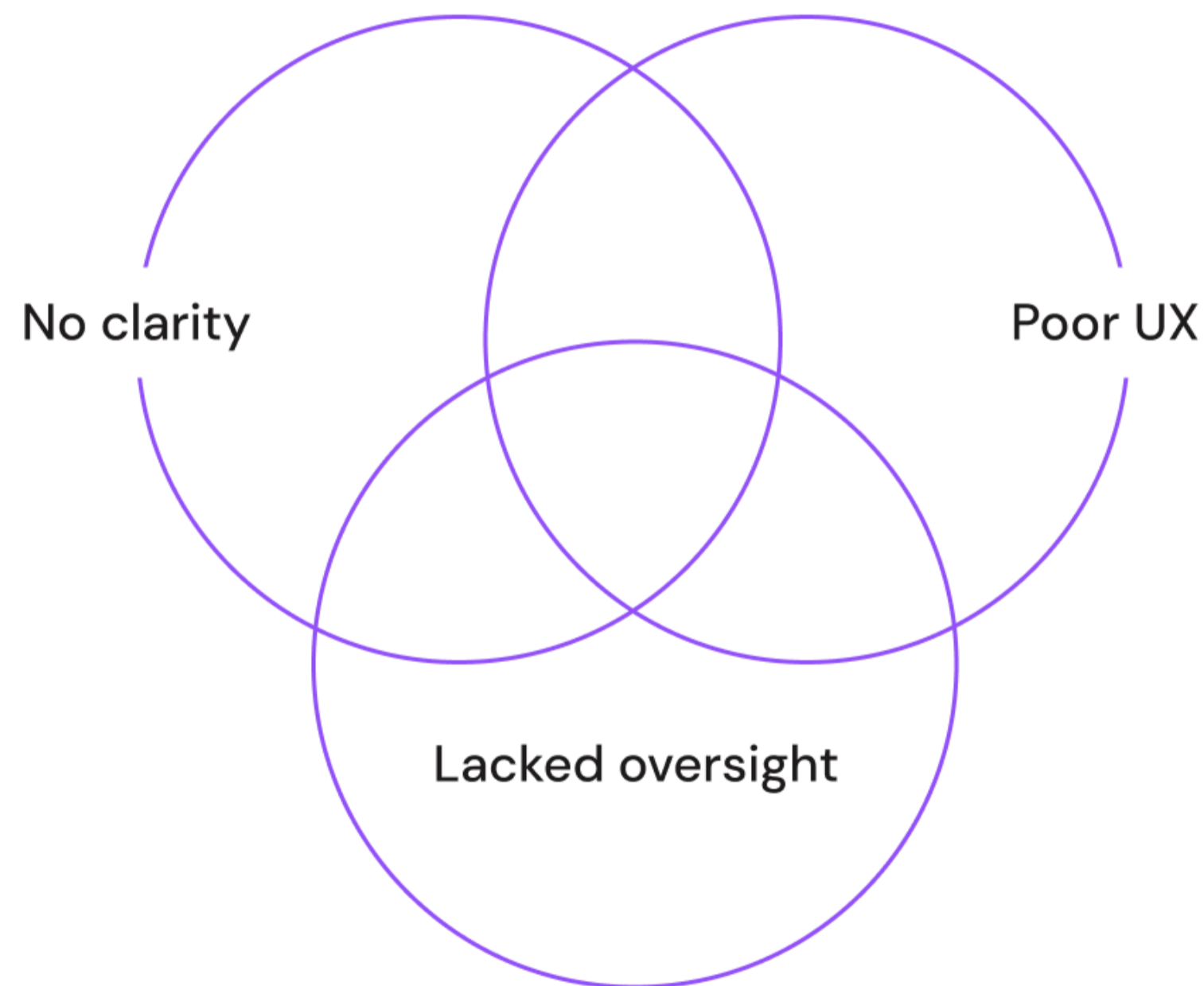
The Inbox is where users see tasks assigned to them across all workflows. It serves two audiences:

- **Assignees**, who need to complete tasks efficiently
- **Managers**, who need visibility into overdue or blocked work

How can we
redesign the inbox
so users instantly
see what needs
action without
disrupting existing
workflows?

THE PROBLEM

Legacy Inbox



No clarity

Users couldn't tell what was overdue, upcoming, or assigned to them.

Poor UX

Tasks opened in a modal with poor UX, making details hard to scan.

Lacked oversight

Difficult to understand team workload or what was falling behind.

GOAL

- Give users and managers instant clarity
- Reduce friction
- Support more scalable task management

SOLUTION

My work

Goal

Give users and managers instant clarity, reduce friction, and support more scalable task management.

Solution

Inbox (My Work) Redesign:

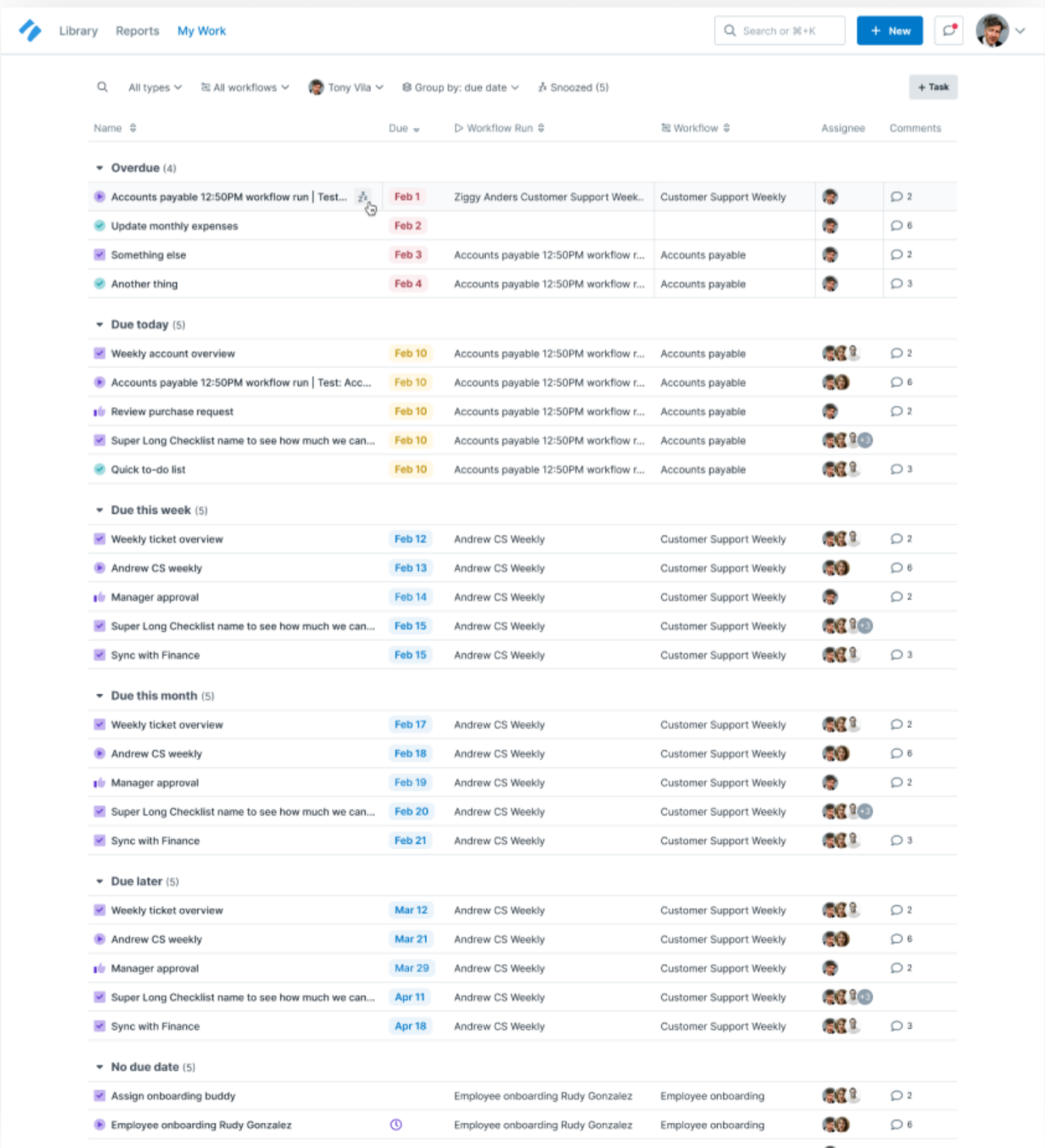
- **Clear prioritization:** Overdue, upcoming, and completed tasks separated with strong visual cues.
- **Better readability:** Cleaner metadata, spacing, and grouping to reduce cognitive load.
- **Manager visibility:** Ownership, deadlines, and blockers surfaced for quick oversight.
- **Scalable model:** Modal replaced with a drawer for smoother navigation.
- **Improved mobile flow**

Trade-off managed

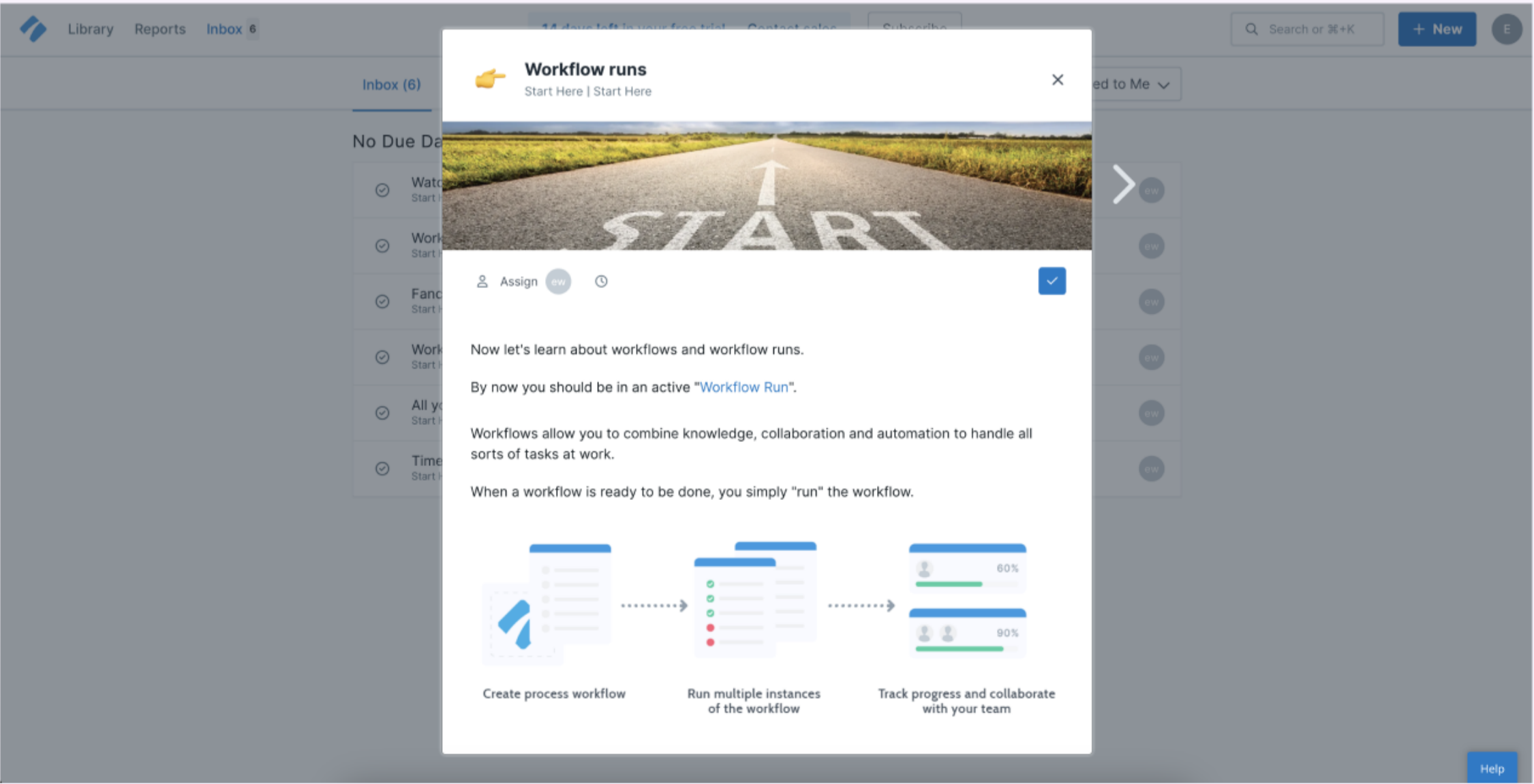
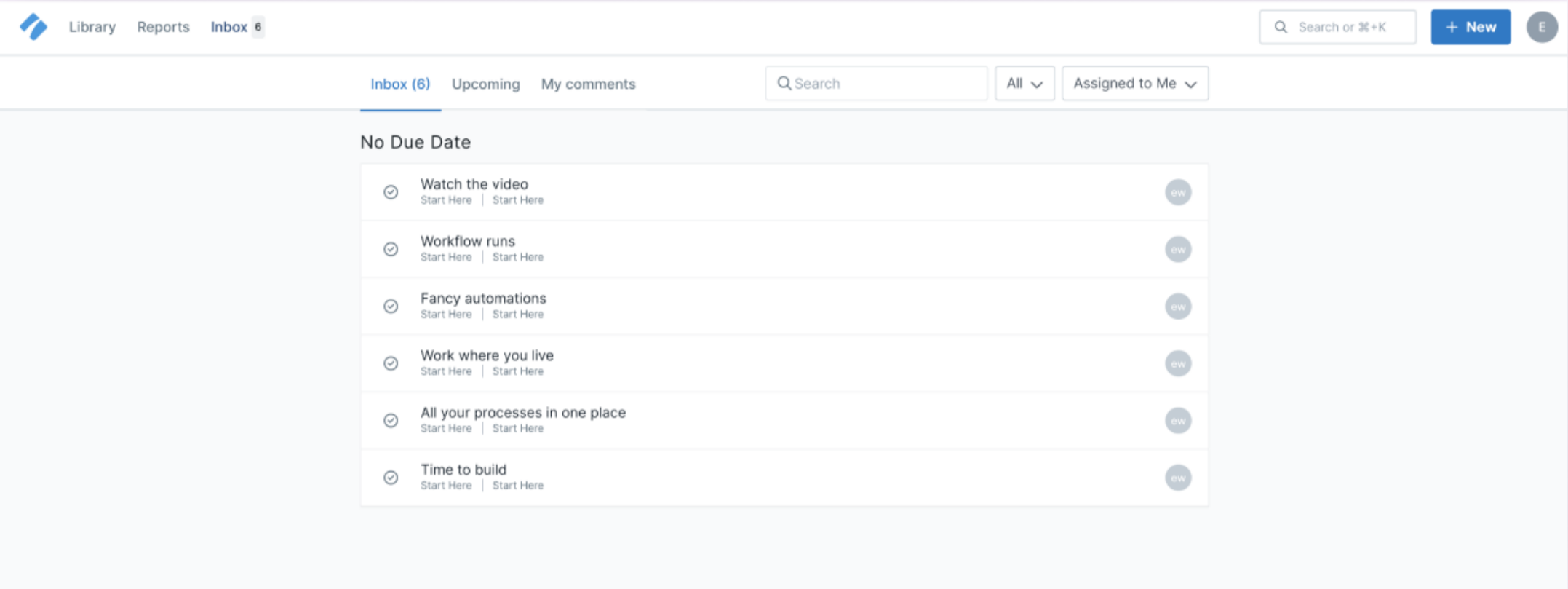
Balancing simplicity for doers with the depth managers need—ensuring added visibility didn’t overwhelm everyday task execution.

Impact

Clearer task hierarchy and improved visibility led to fewer overdue tasks and higher completion rates, benefiting both individual users and managers.



INBOX: BEFORE



One-off Tasks

Goal

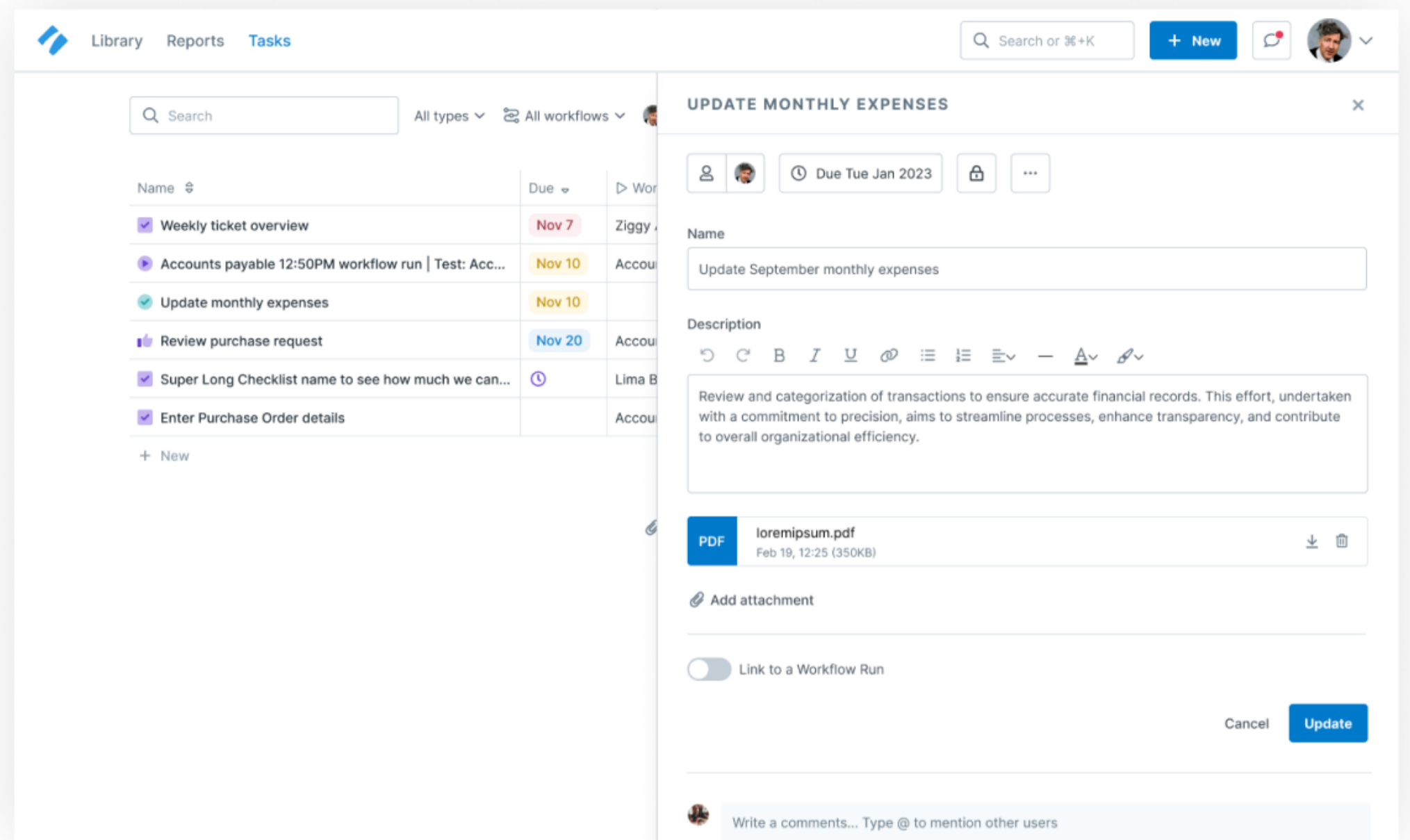
During redesign, we identified that users needed quick, ad-hoc tasks outside formal workflows.

Solution

Created a new feature called *One-Off Tasks*. Accessible directly from the inbox, lightweight, stand-alone tasks that can be assigned, tracked, and completed alongside workflow tasks.

Impact

Supported daily work, reduced reliance on external to-do tools, and kept all responsibilities centralized.



How We Delivered It

Sequencing Strategy

1. **Task & inbox audit** → identify pain points
2. Low-fidelity **restructuring of task hierarchy**
3. **Drawer task layout** (foundation)
4. **Inbox overhaul** (visual clarity + prioritization)
5. **One-Off Tasks** added after core experience stabilization

Trade-offs Managed

- More detail vs. risk of information overload
- Replacing modal interactions without disrupting power users
- Introducing One-Off Tasks without fragmenting task types

Collaboration

- Worked with PM to define clarity & completion metrics
- Partnered with engineering to replace modal logic with navigable routes
- Validated designs with CS and customer-facing teams to ensure manager needs were met

Outcomes & Impact

Usability & Clarity Improvements

- +22%** improvement in **task comprehension** during usability testing
- 19%** fewer **support complaints** related to "can't find my tasks"
- 15%** reduction in overdue tasks (better prioritization + visibility)

Engagement & Productivity

- +8%** increase in **task completion rate**
- ✓ **High adoption of One-Off Tasks** (*within first 30 days*)
- ✓ **Better team visibility** into blockers and deadlines

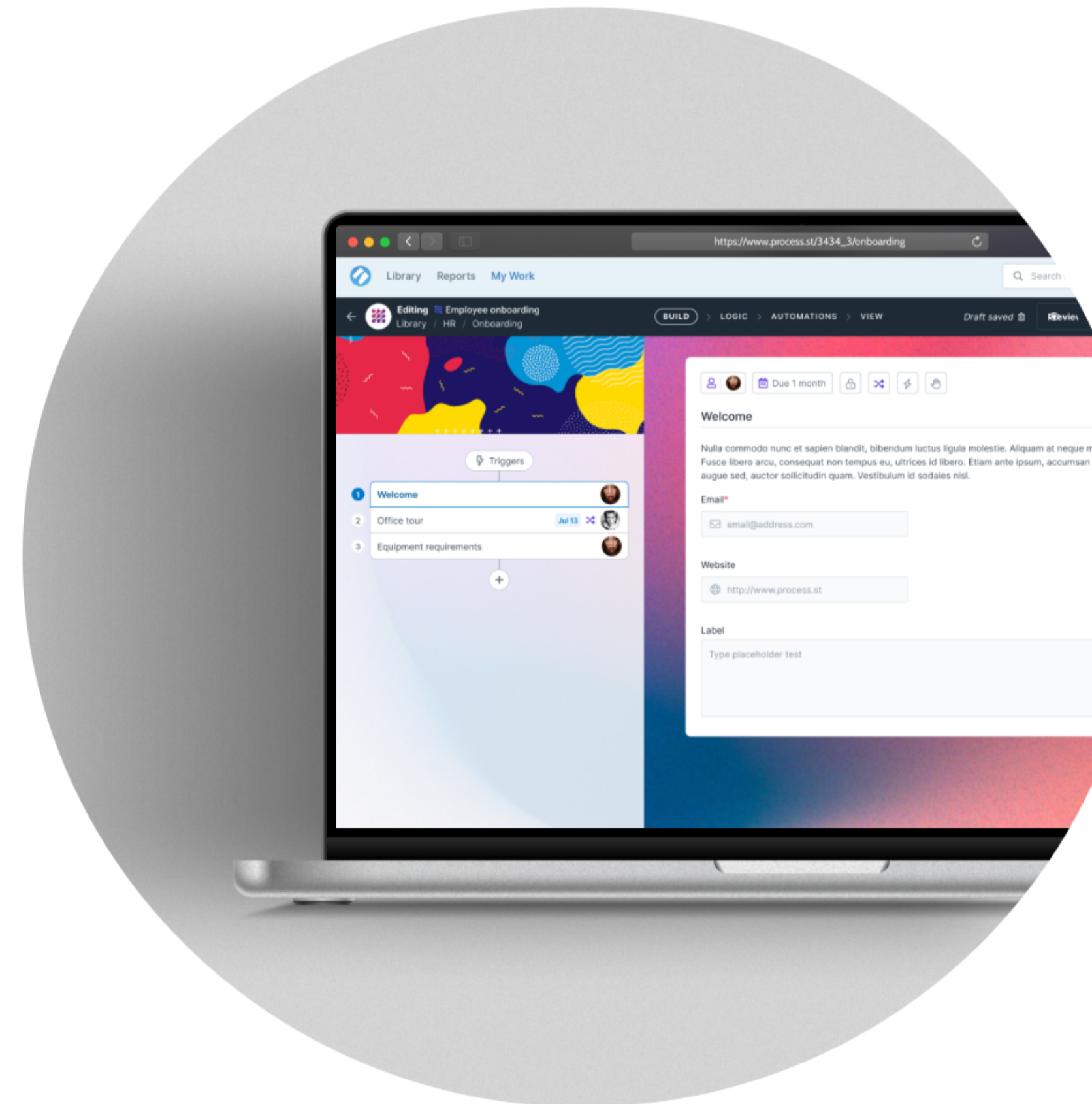
Redesigning the inbox turned scattered tasks into a clear, actionable workspace.

SHARED LEARNINGS

Designing for Growth & Scale

What we learned

- **Start with clarity**, not features: Both AI onboarding and the inbox redesign showed that users need a clear starting point.
- **Context is everything**: AI needed better role/company context, and the inbox needed clearer task metadata. The right context directly drives confidence.
- **Guide users to momentum**: Removing the blank, page problem (AI) and surfacing priorities (Inbox) both accelerated meaningful action.
- **Balance simplicity and depth**: New users need simplicity, but managers and power users still require depth, both solutions had to serve dual audiences.
- **Small design choices compound**: Improving hierarchy, spacing, and status cues in both flows significantly reduced friction and increased comprehension.





Context, alignment, and
timing proved just as critical
as design execution.

MISTAKES & LESSONS

What I'd Do Differently

- **AI onboarding context:** Early prototypes lacked enough role/company detail for accurate suggestions. Refining prompts later improved trust and relevance.
- **Inbox complexity:** Initial concepts risked overwhelming users with too much detail; simplifying states and hierarchy earlier would've reduced redesign cycles.
- **Measurement overlap:** AI and inbox improvements launched close together, making attribution harder, planning spaced rollouts or clearer tracking would help isolate impact.
- **Task model alignment:** One-Off Tasks required careful integration with Inbox logic; aligning task types earlier would have reduced product edge cases.

WHAT I BRING:

- Ownership of ambiguity → vision to delivery
- End-to-end product-driven design decisions balancing business, users & tech
- Sequential planning and trade-off mastery
- Systems mindset driving reuse, scalability & craft

Designing for Clarity in Complex Systems

Thanks!

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