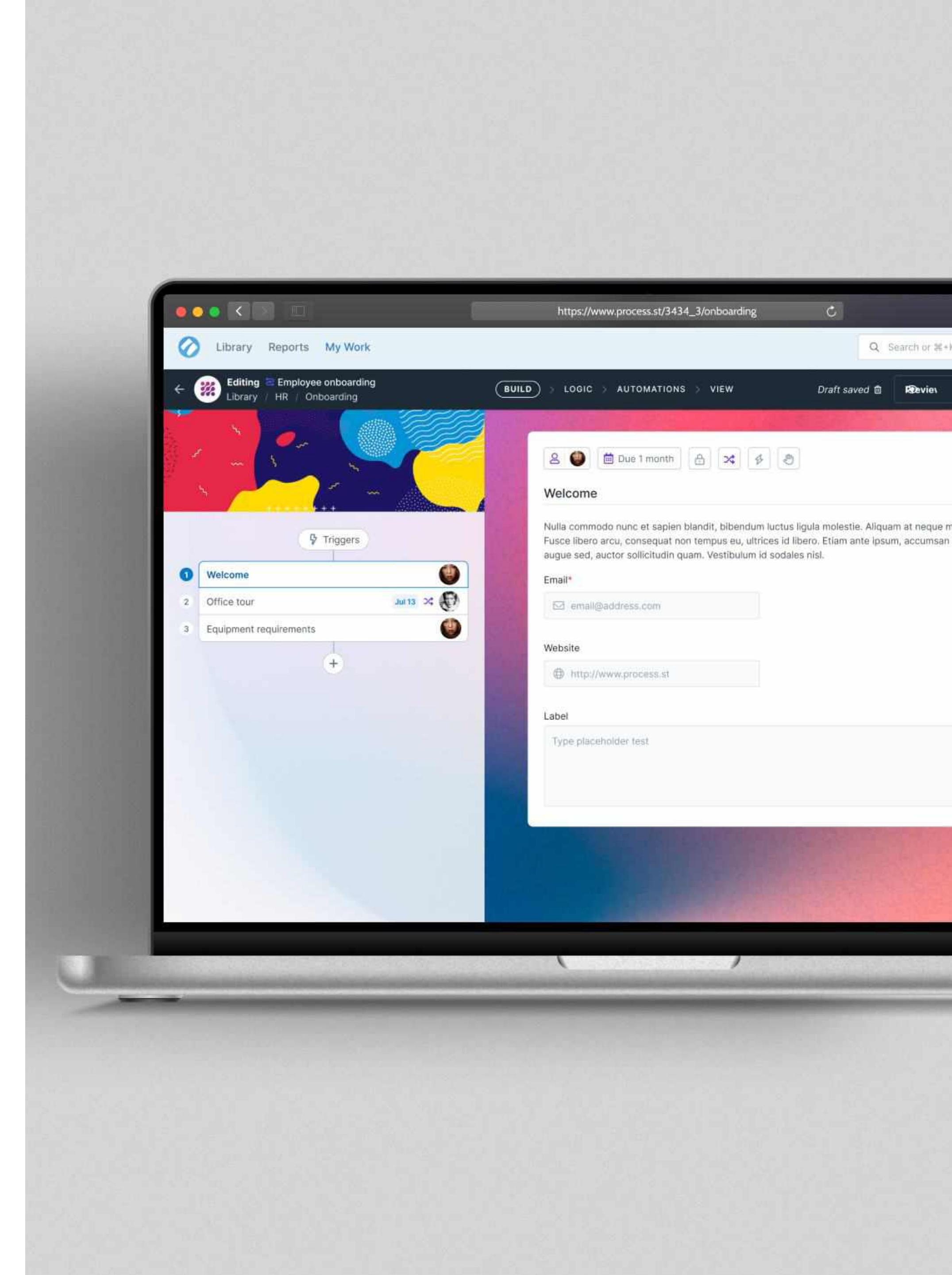


# Indiana Caba

# *Designing for Clarity & Scale*



## Agenda

- 1 About me
- 2 AI-Powered Workflows  
Process Street, 2025
- 3 Inbox, Made Clear  
Process Street, 2024
- 4 Key Takeaways and Q&A



Hello! I'm *Indiana*.

Senior Product designer based in Spain

## About me

## Recent experience and education



**Staff Product Designer at Process Street**  
2021–2025



**Senior Product Designer at Zapier**  
2017–2019



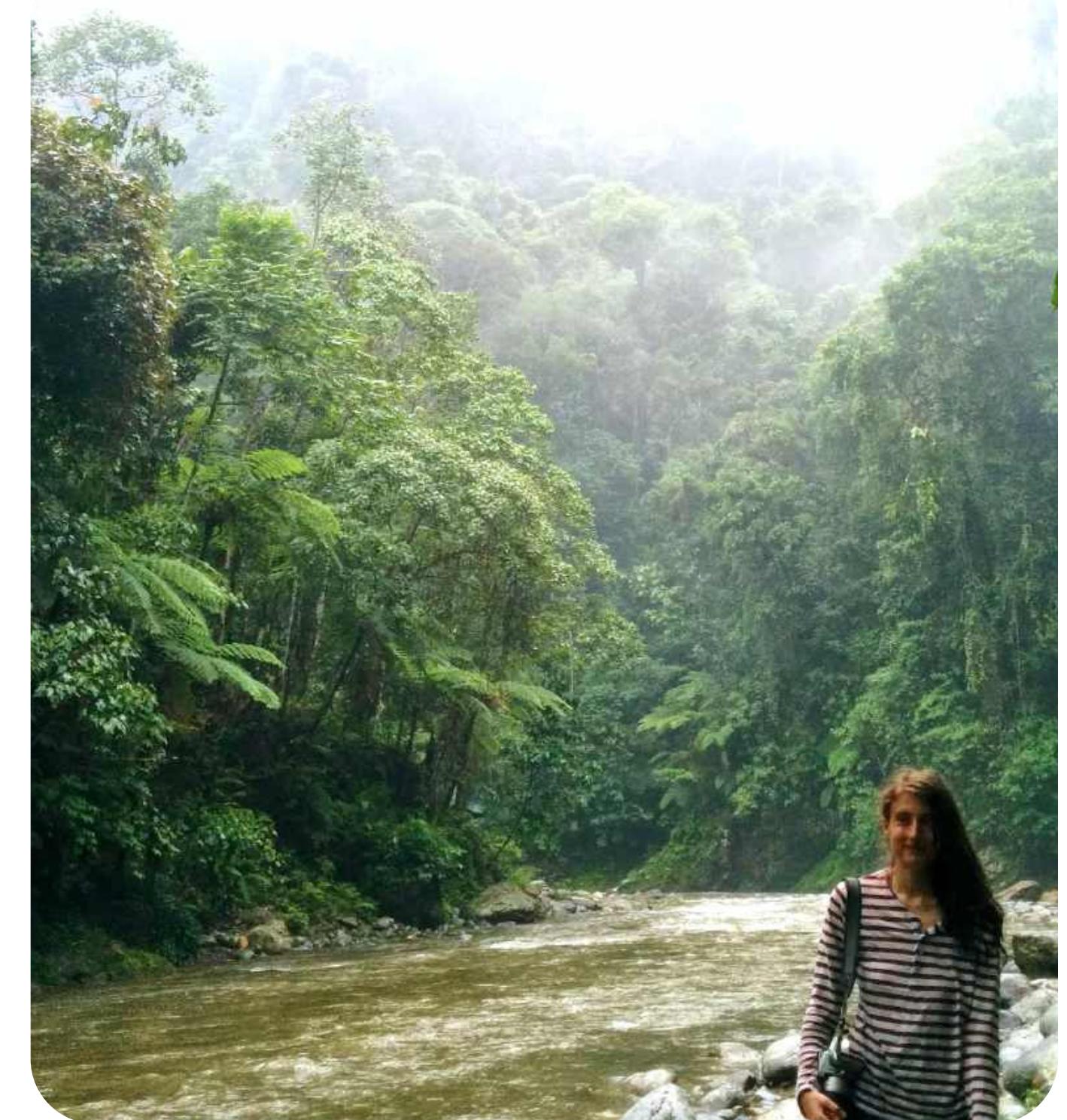
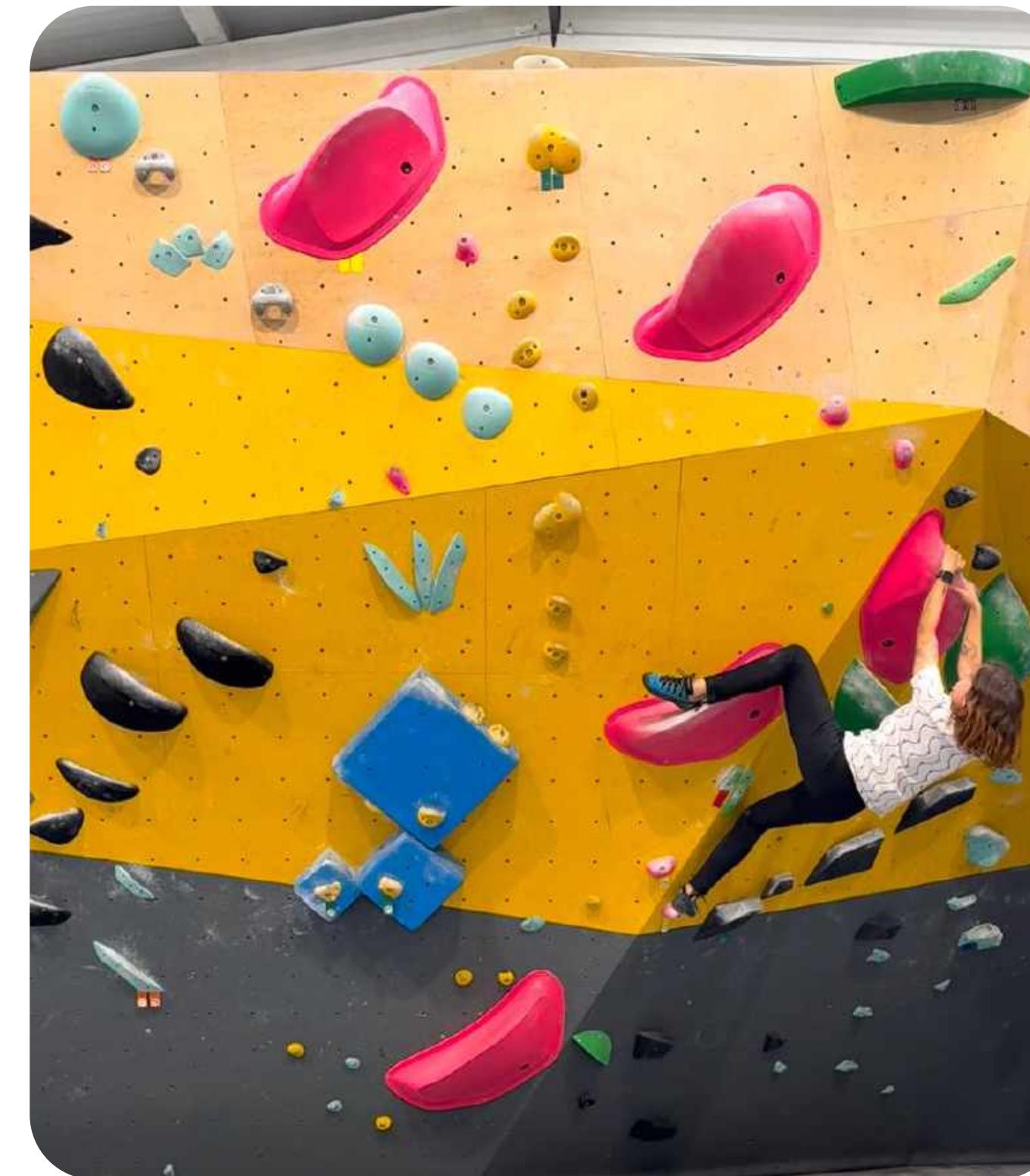
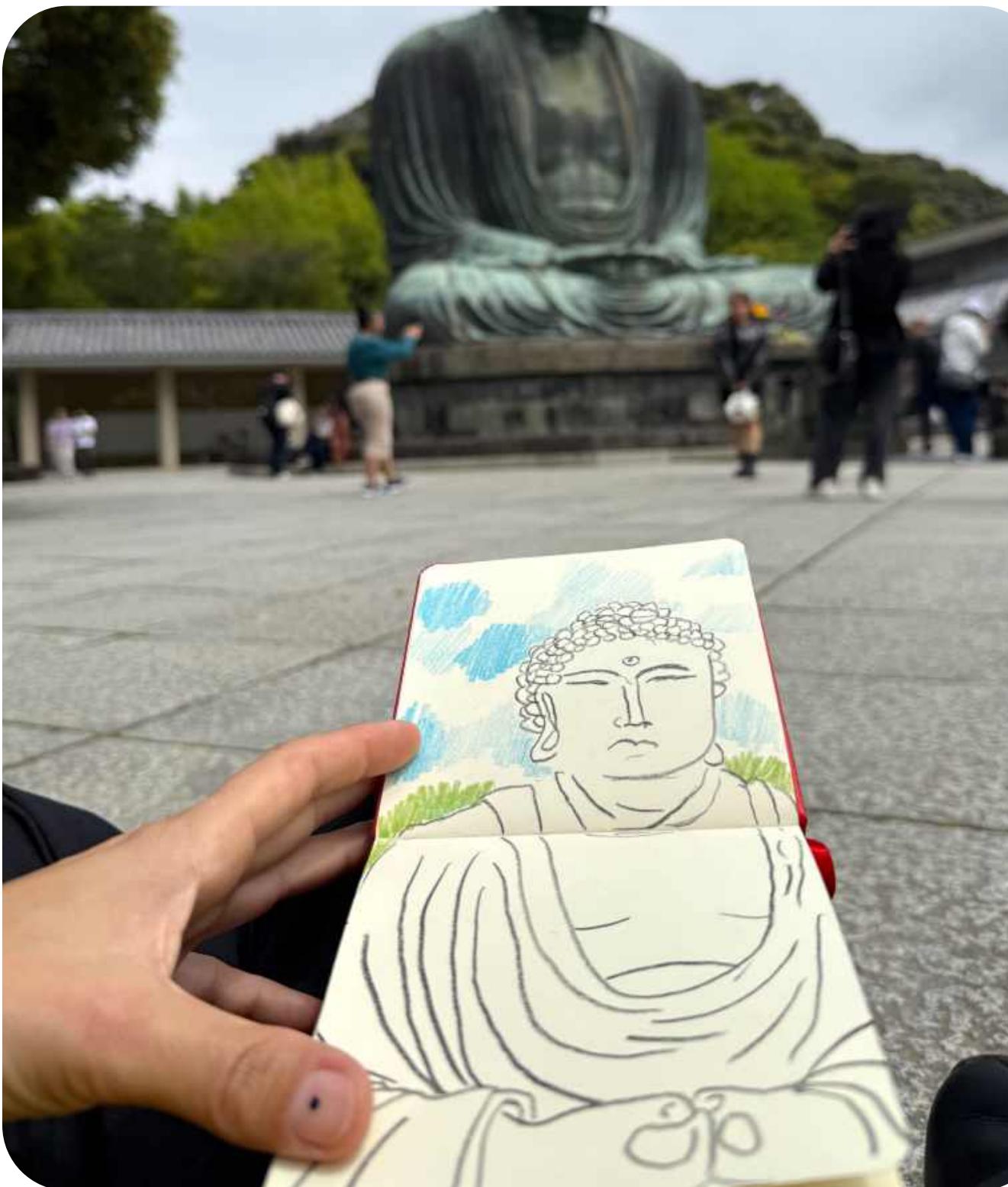
**Lead Product Designer at EnjoyHQ**  
2016–2017



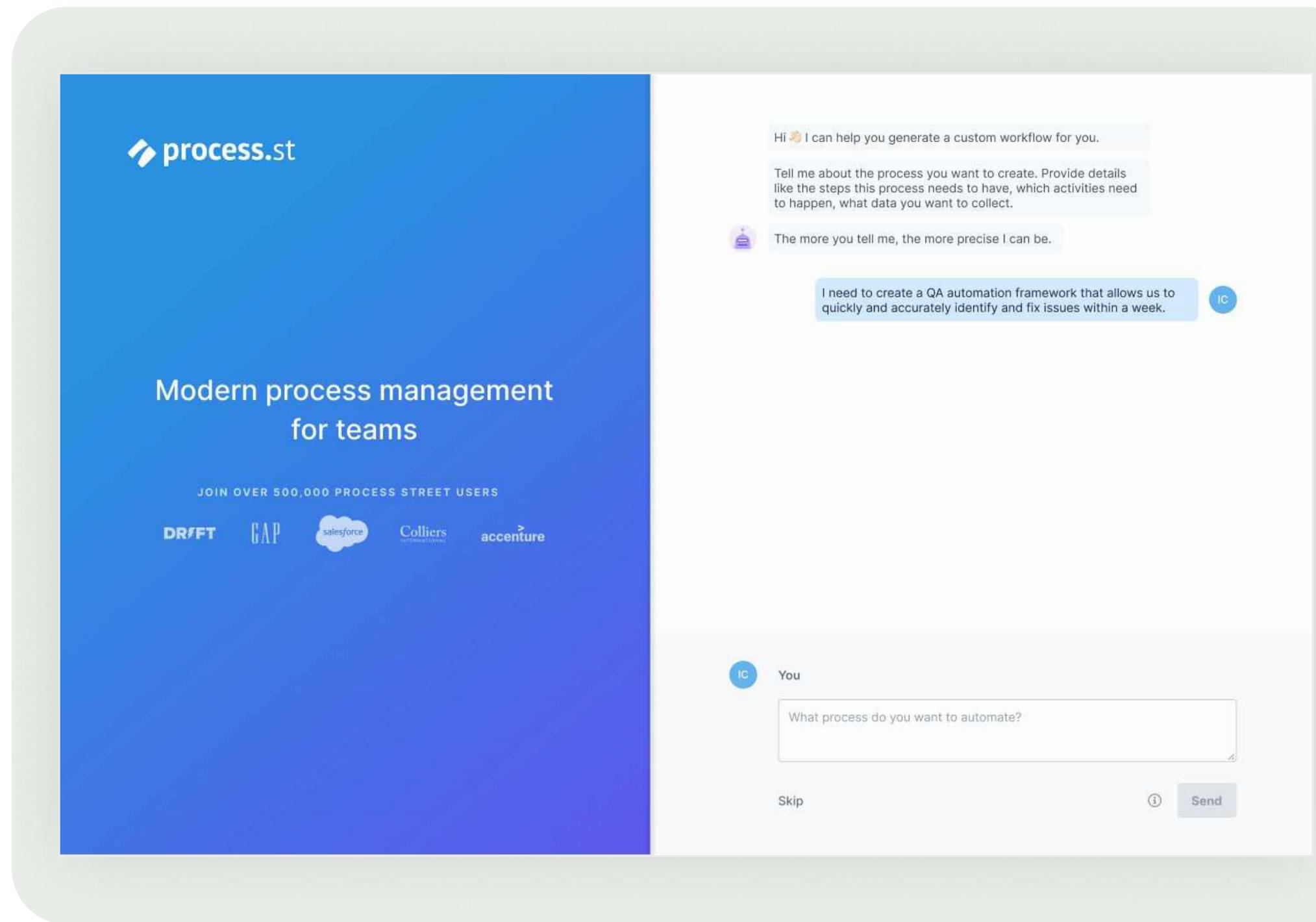
**Communication & Media Studies**  
BA & MA, Complutense University  
2005–2015

## About me

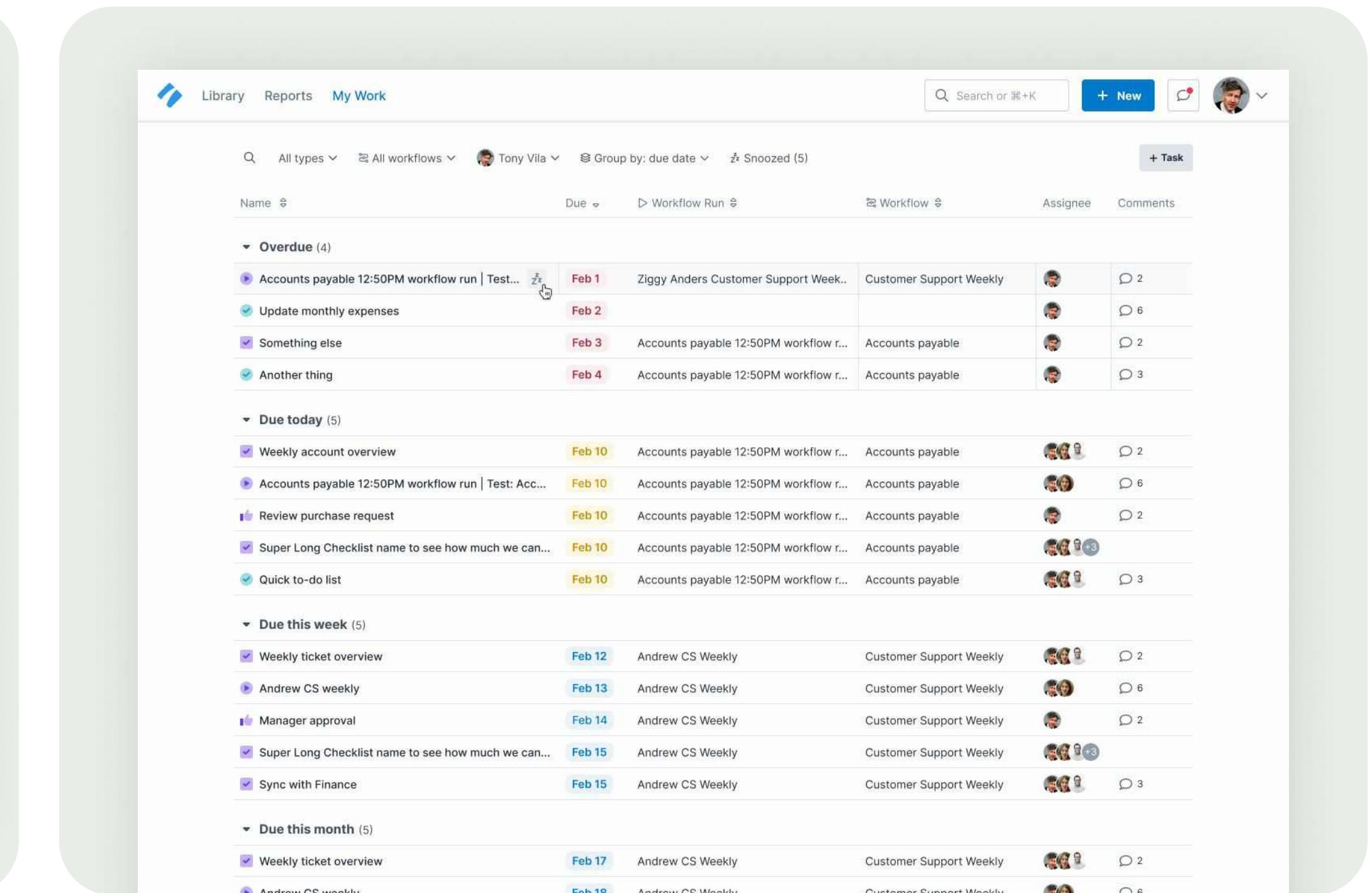
Outside of product design, here's what keeps me inspired



# Selected projects



AI-Powered Workflows  
Process Street, 2025



Inbox, Made Clear  
Process Street, 2024

# *AI-Powered Workflows*



## AI-Powered Workflows

Building from scratch felt overwhelming for new users, delaying their aha moment and activation.

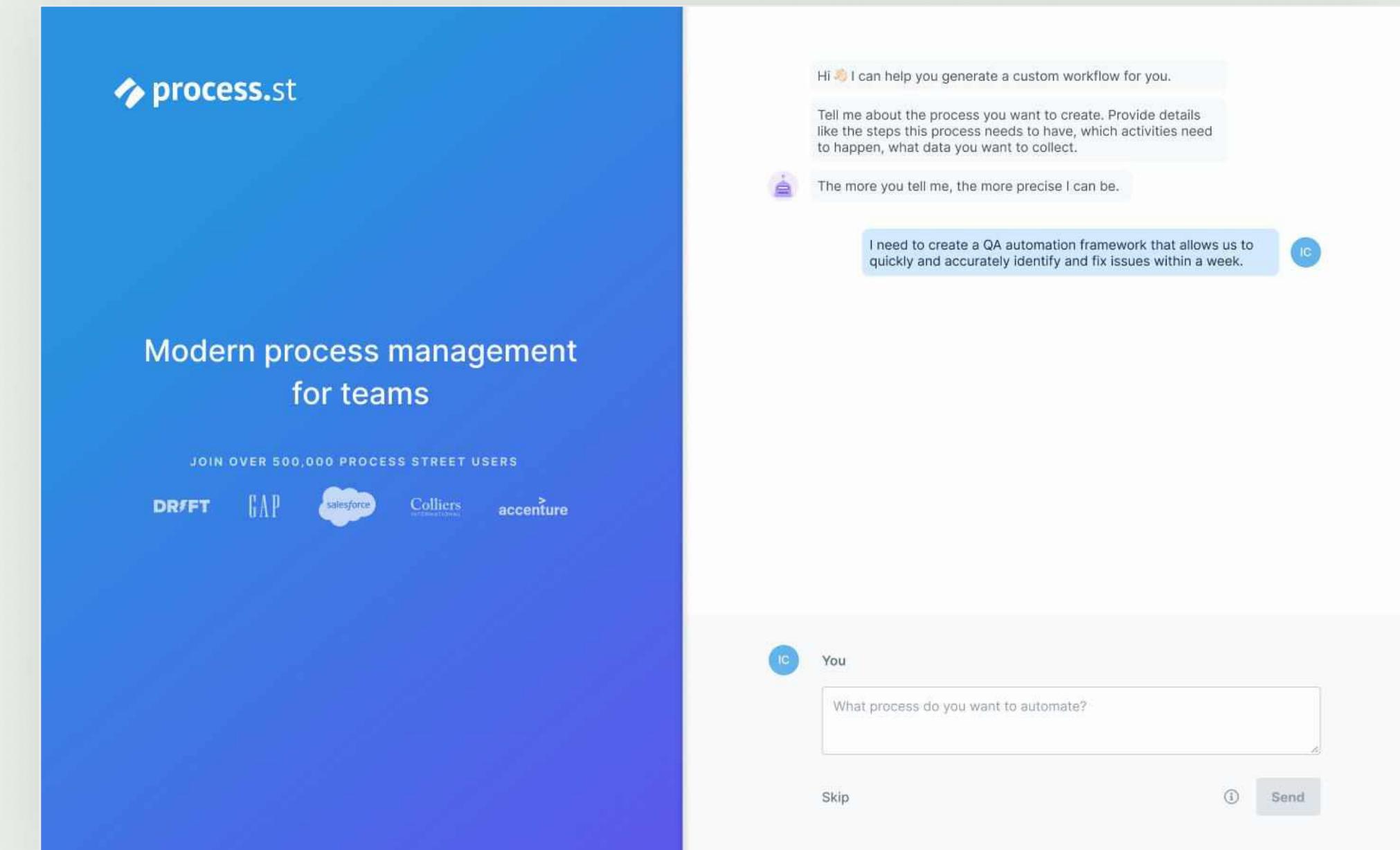
Company      Process Street

Role      Staff Product Designer

Length      2 months

Team      VP of Product · Senior Product Manager · Engineering Director · Designers · Engineers · CS

Year      2025



## The challenge

**How might we help new users reach an “aha moment” faster by reducing the overwhelm of starting from scratch?**

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### Specific goals

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

### Key metrics

- Activation Rate (Primary KPI)
- Time to First Value (TTFV)
- Workflow Creation Volume
- 7-day / 30-day Retention

## Solution #1

# AI Workflow Generator

### Goal

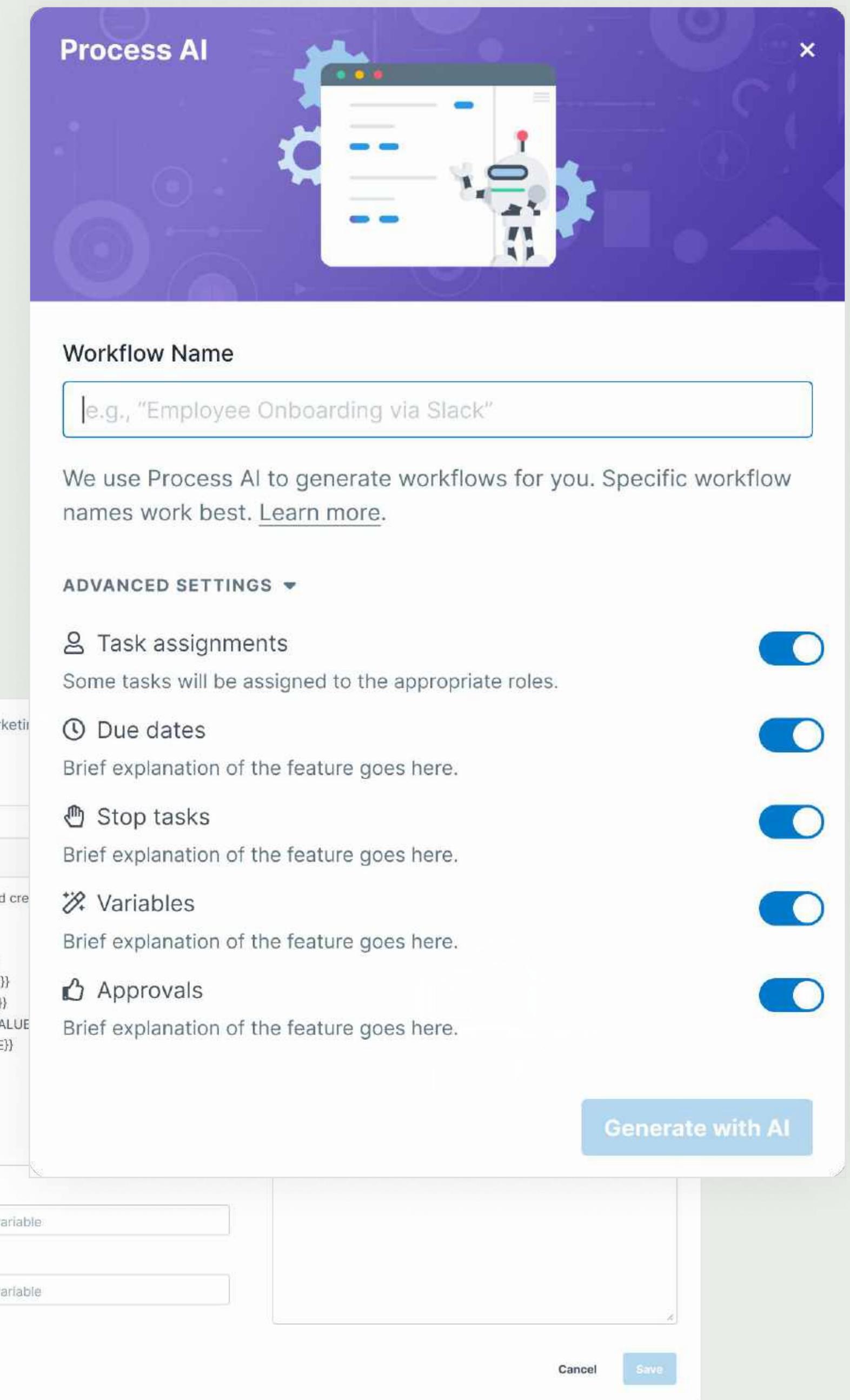
Accelerate workflow creation with assistive automation that remains transparent and editable.

### Description

- Built an **AI workflow generator** that turns text input into structured, editable workflows with assignments, due dates, and automations.
- Added an **explanation layer** to show why each step was suggested and build trust.
- Following this work, we launched an **AI task generator** with a built-in sandbox.

### Impact

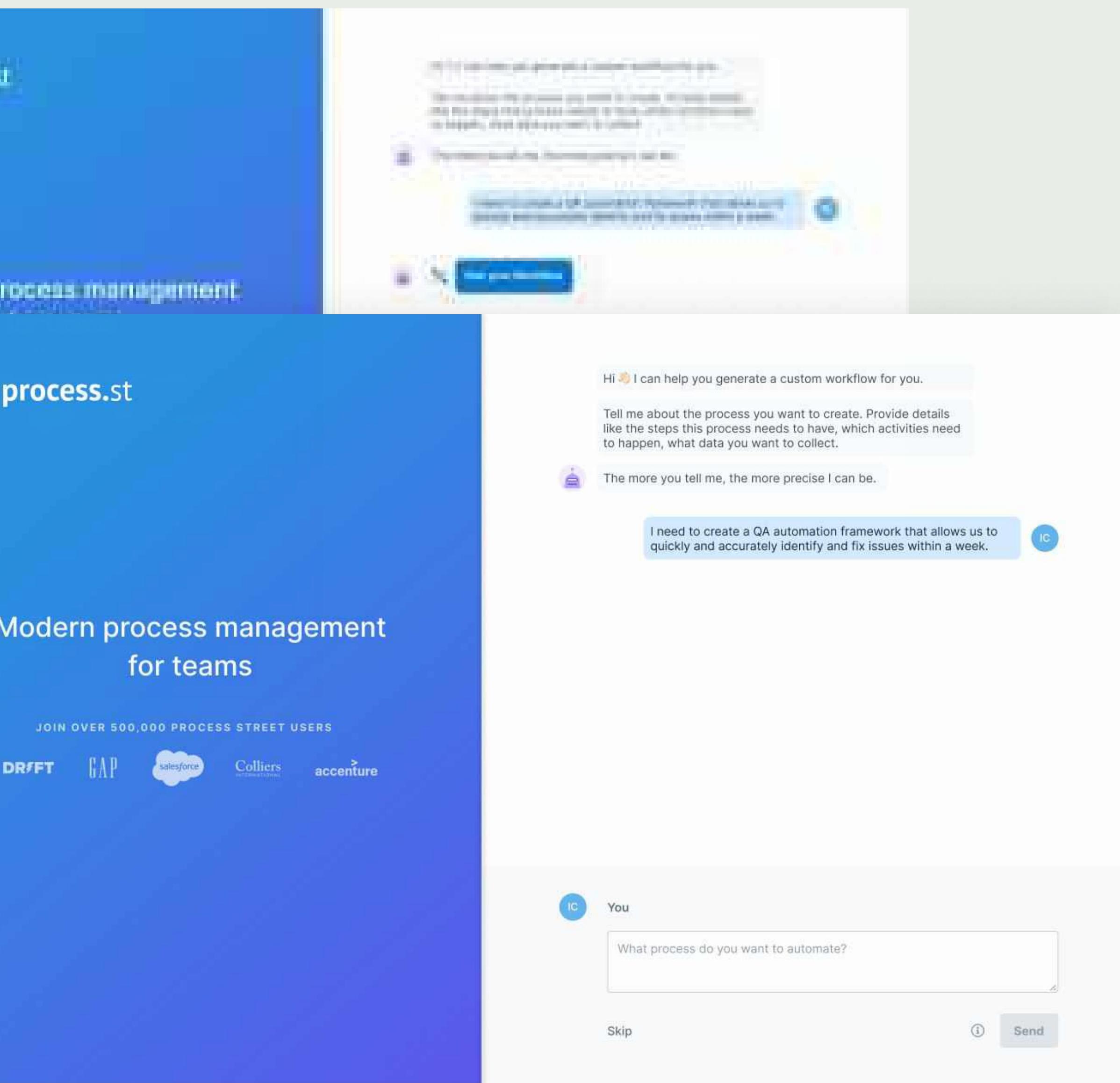
Enabled faster workflow creation and quicker time-to-value for users.



The screenshot shows a web-based application for generating AI workflows. At the top, a purple header bar features the text "Process AI" and a close button "X". Below the header is a decorative background with a robotic arm and gears. The main interface includes a "Workflow Name" input field with placeholder text "e.g., 'Employee Onboarding via Slack'". A descriptive note below the input states: "We use Process AI to generate workflows for you. Specific workflow names work best. [Learn more.](#)". On the right, there is a section titled "ADVANCED SETTINGS" with several toggle switches. The settings are: "Task assignments" (on), "Some tasks will be assigned to the appropriate roles.", "Due dates" (on), "Brief explanation of the feature goes here.", "Stop tasks" (on), "Brief explanation of the feature goes here.", "Variables" (on), "Brief explanation of the feature goes here.", "Approvals" (on), and "Brief explanation of the feature goes here.". At the bottom right of the main form is a blue button labeled "Generate with AI". At the very bottom of the page are "Cancel" and "Save" buttons.

## Explorations

We explored low-fidelity approaches (a *floating AI widget*, *Split View*, or *homepage modal*), and gathered early feedback from the Process Street power user group.



## Solution #2

# AI-Assisted Onboarding

### Goal

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

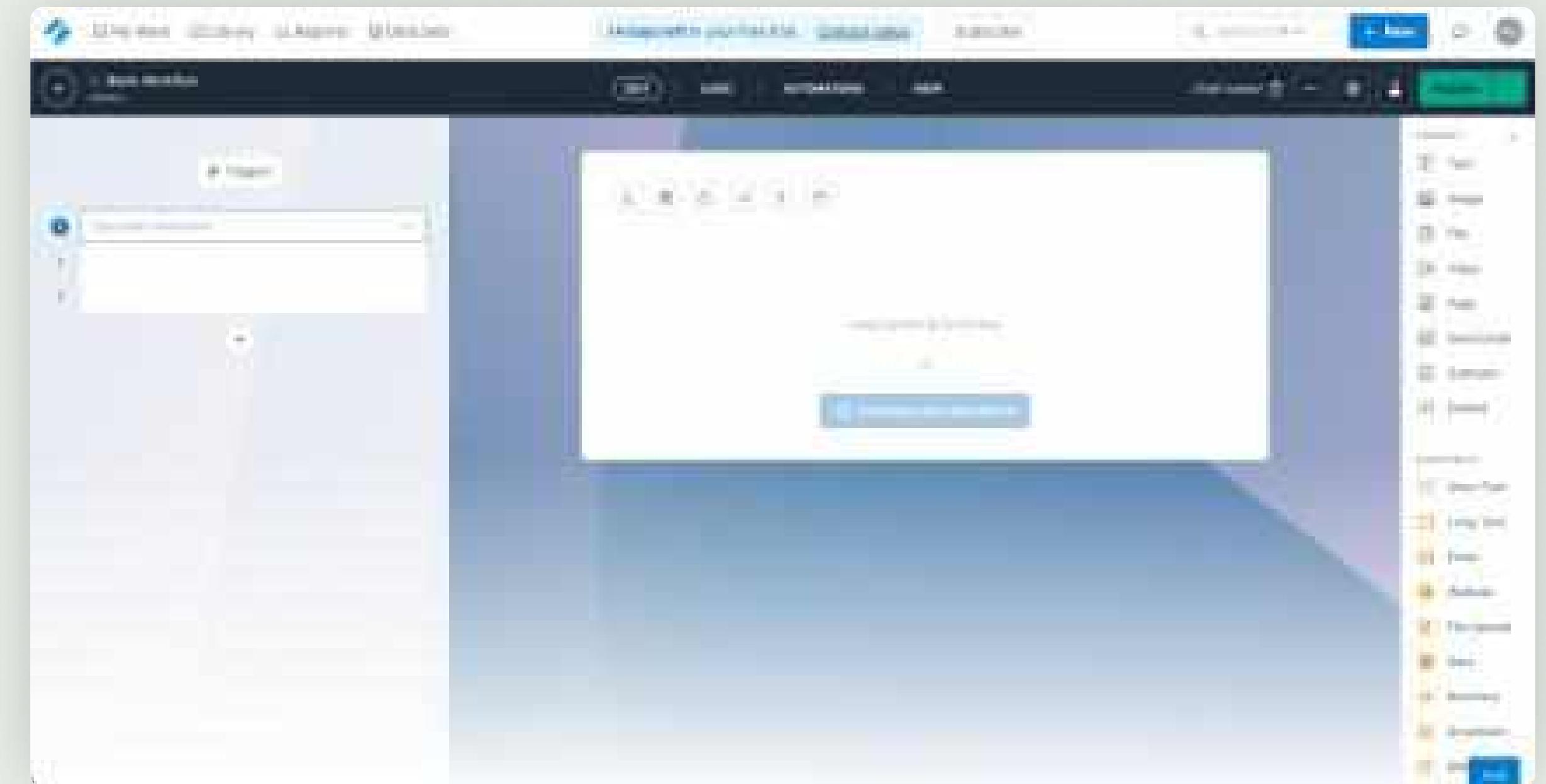
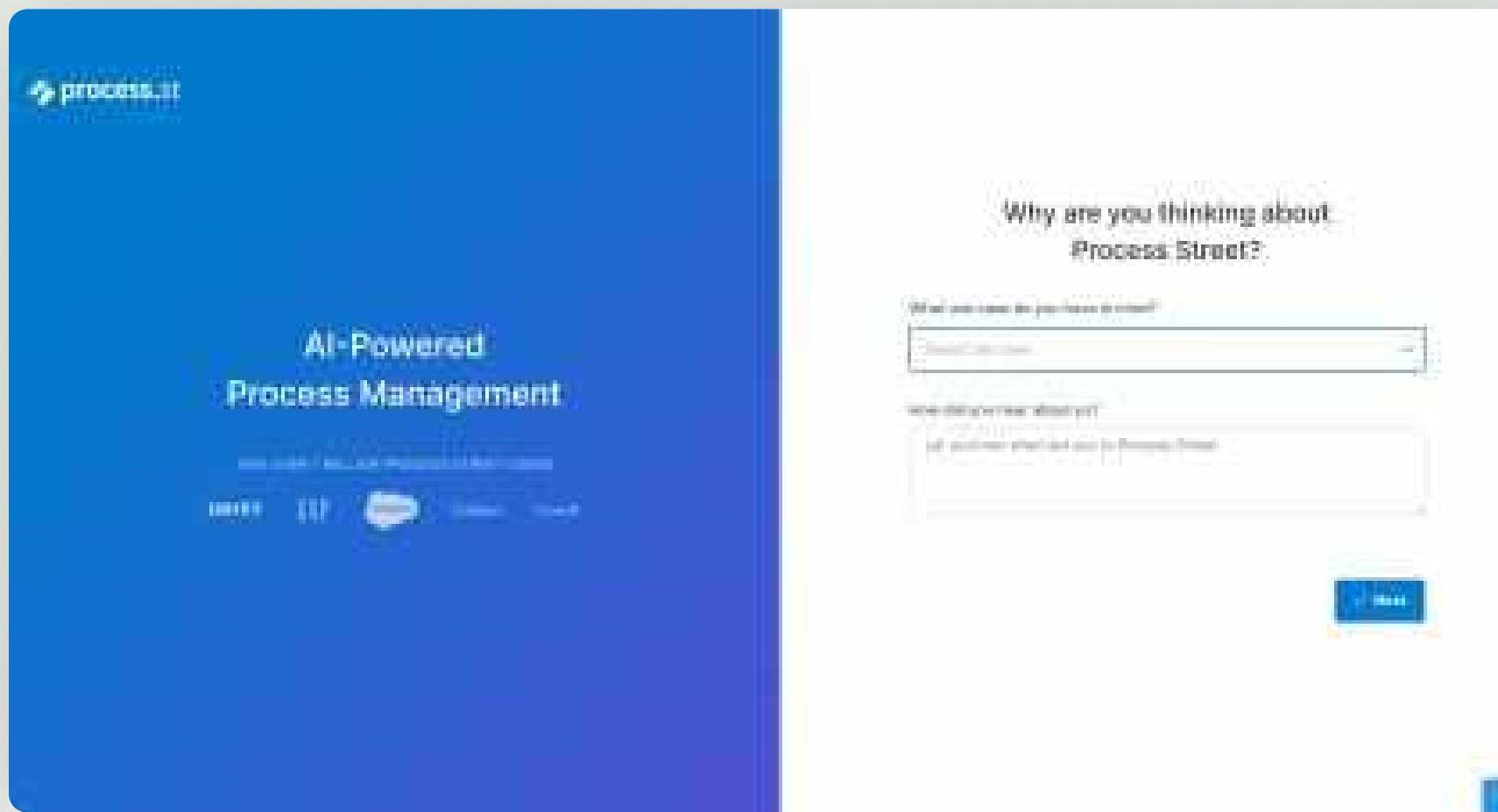
### Description

- Introduced an **AI onboarding agent** that uses signup context (role, industry) and user answers to instantly generate tailored workflows.
- Added **smart defaults and guided tooltips** to explain AI suggestions and reduce friction.
- Turned onboarding into a **personalized**, educational first experience.

### Impact

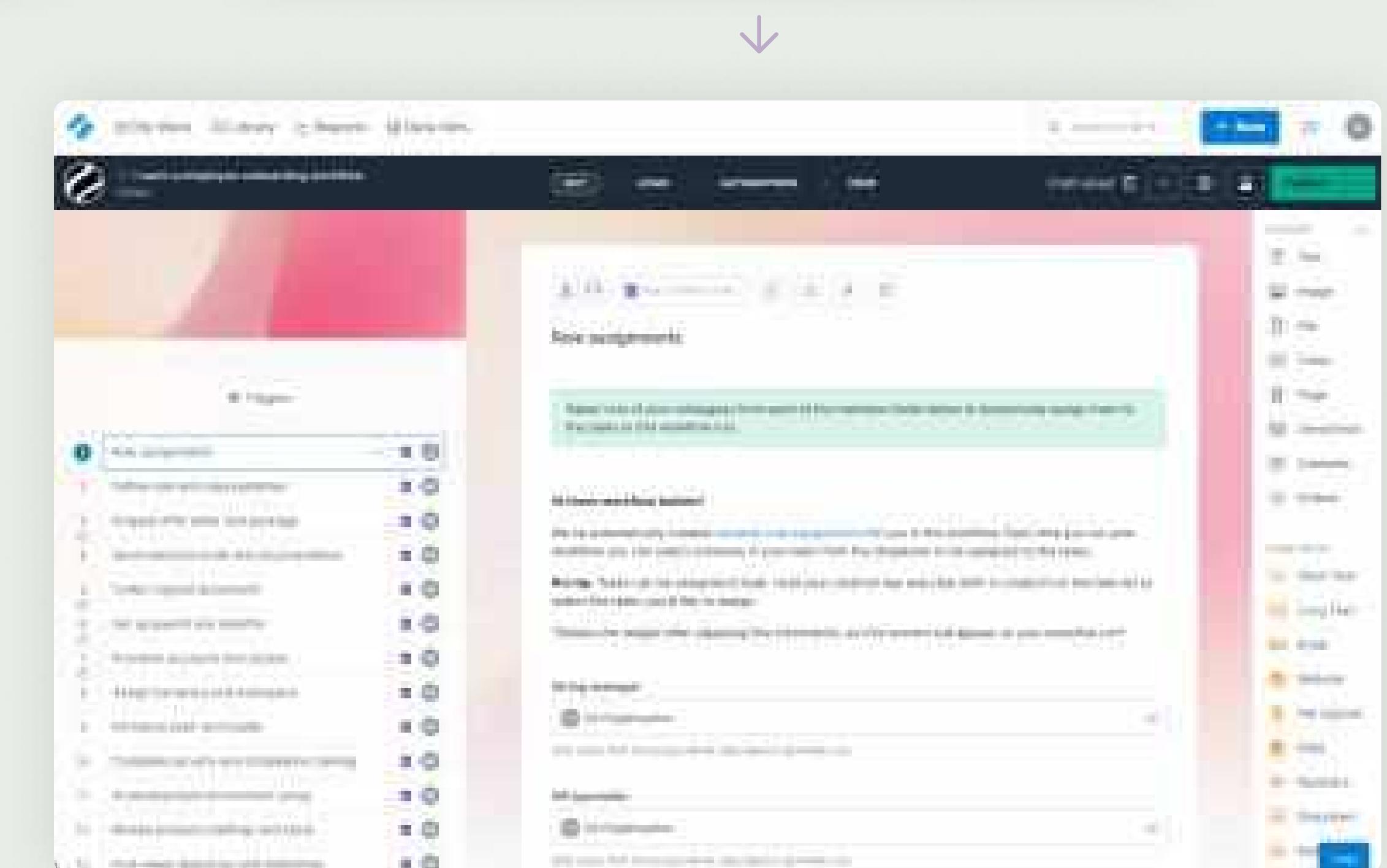
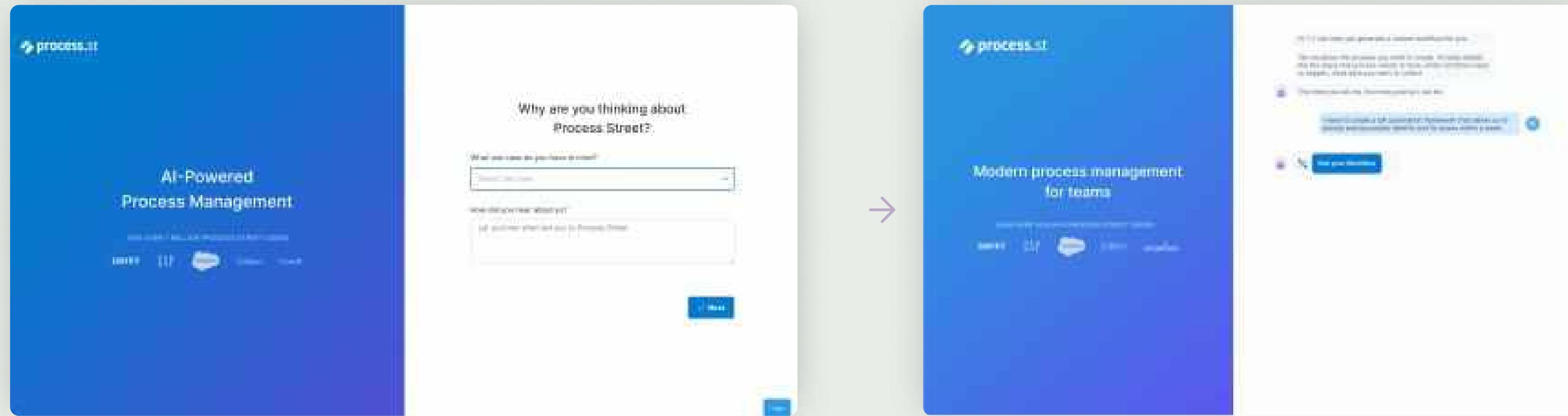
Reduced blank-page anxiety, improved activation, and built early confidence in AI as a helpful collaborator.

# Before



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

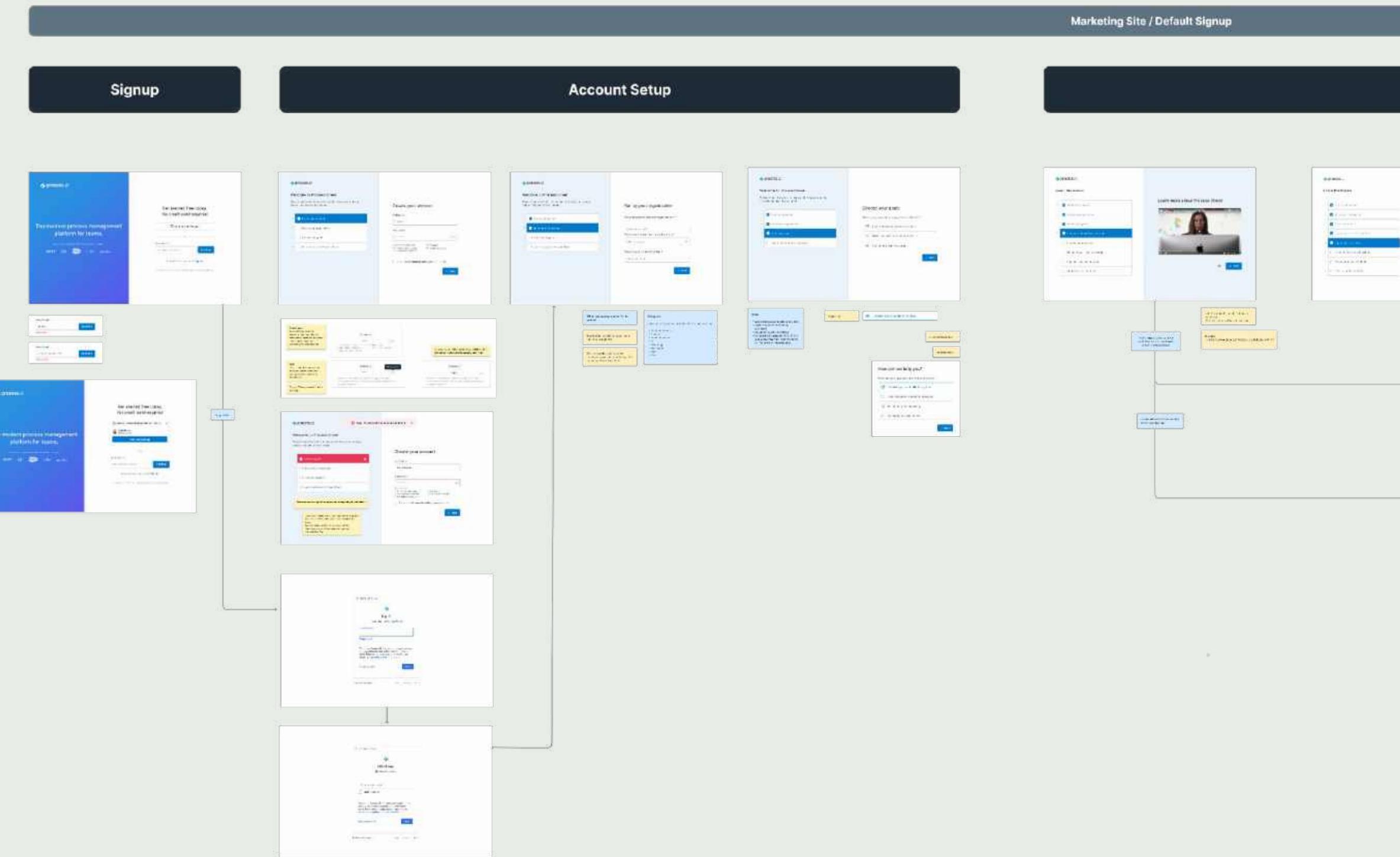
# After



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.

# Process

- 1. Analyzed onboarding data**, session replays, and user feedback to identify where new users dropped off.
- 2. Framed the problem** around reducing the blank-page effect and accelerating the first “aha moment.”
- 3. Explored and tested multiple concepts** (smart templates, guided builders, AI assistance).
- 4. Iterated with Product and Engineering** and shipped the most impactful, scalable solution.
- 5. Measured activation** and gathered **qualitative feedback** post-launch.



We explored multiple AI onboarding concepts with different cost trade-offs, testing them internally and with power users.

The image displays three distinct AI onboarding concepts, each with a blue header and a light blue background.

- Smart templates** (left):
  - Smart Template Finder:** An AI-powered template recommendation system.
  - Search bar: "Search workflows or describe your needs..."
  - Section: "Select your department:" with icons for Sales, HR, Support, Finance, Operations, and Product.
- Guided builder** (center):
  - Guided Workflow Builder:** An AI-powered workflow creation tool.
  - Workflow steps: "Workflow Basics" (Step 1 of 4), "Workflow Name", "Description", and "Primary Goal".
  - Buttons: "Back" and "Next".
- Process mining** (right):
  - Process Mining Onboarding:** AI discovers workflows from your data.
  - Section: "Upload Your Data" with a "Drop files here or click to upload" area and a CSV, Excel, or JSON file icon.
  - Section: "Supported Data Sources" with checkboxes for Email Logs, Task Data, CRM Events, Help Desk Tickets, Calendar Events, and Project Tasks.

## Results

# Driving Activation Through AI

**+18%**

increase in  
**new-user activation**

**+11%**

increase in **workflow**  
**creation**

**+25%**

faster **time-to-first-**  
**workflow**

“

AI turned not knowing where to start into confident first steps

*Inbox, Made Clear*



## Inbox, Made Clear

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

Company      Process Street

Role      Staff Product Designer

Length      4 months

Team      VP of Product · Senior Product Manager ·  
Designers · Engineers · CS

Year      2024

The screenshot shows the Process Street 'My Work' inbox. At the top, there are filters for 'All types', 'All workflows', 'User: Tony Vila', 'Group by: due date', and 'Snoozed (5)'. The main area is a list of tasks categorized by due date:

- Overdue (4):**
  - Accounts payable 12:50PM workflow run | Test: Acc...
  - Update monthly expenses
  - Something else
  - Another thing
- Due today (5):**
  - Weekly account overview
  - Accounts payable 12:50PM workflow run | Test: Acc...
  - Review purchase request
  - Super Long Checklist name to see how much we can...
  - Quick to-do list
- Due this week (5):**
  - Weekly ticket overview
  - Feb 12 Andrew CS Weekly
  - Accounts payable
  - Feb 13 Andrew CS Weekly
  - Customer Support W...
  - Feb 14 Andrew CS Weekly
  - Customer Support W...
  - Feb 15 Andrew CS Weekly
  - Customer Support W...
  - Feb 15 Andrew CS Weekly
  - Customer Support W...
- Due this month (5):**
  - Weekly ticket overview
  - Feb 17 Andrew CS Weekly
  - Customer Support W...
  - Feb 18 Andrew CS Weekly
  - Customer Support W...
  - Feb 19 Andrew CS Weekly
  - Customer Support W...
  - Feb 20 Andrew CS Weekly
  - Customer Support W...
  - Feb 21 Andrew CS Weekly
  - Customer Support W...

At the bottom right are 'Save' and 'Remove' buttons. The calendar view on the right shows tasks for January 2024, with days 25 and 26 highlighted in blue, indicating they are due on those dates.

## The challenge

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

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### Specific goals

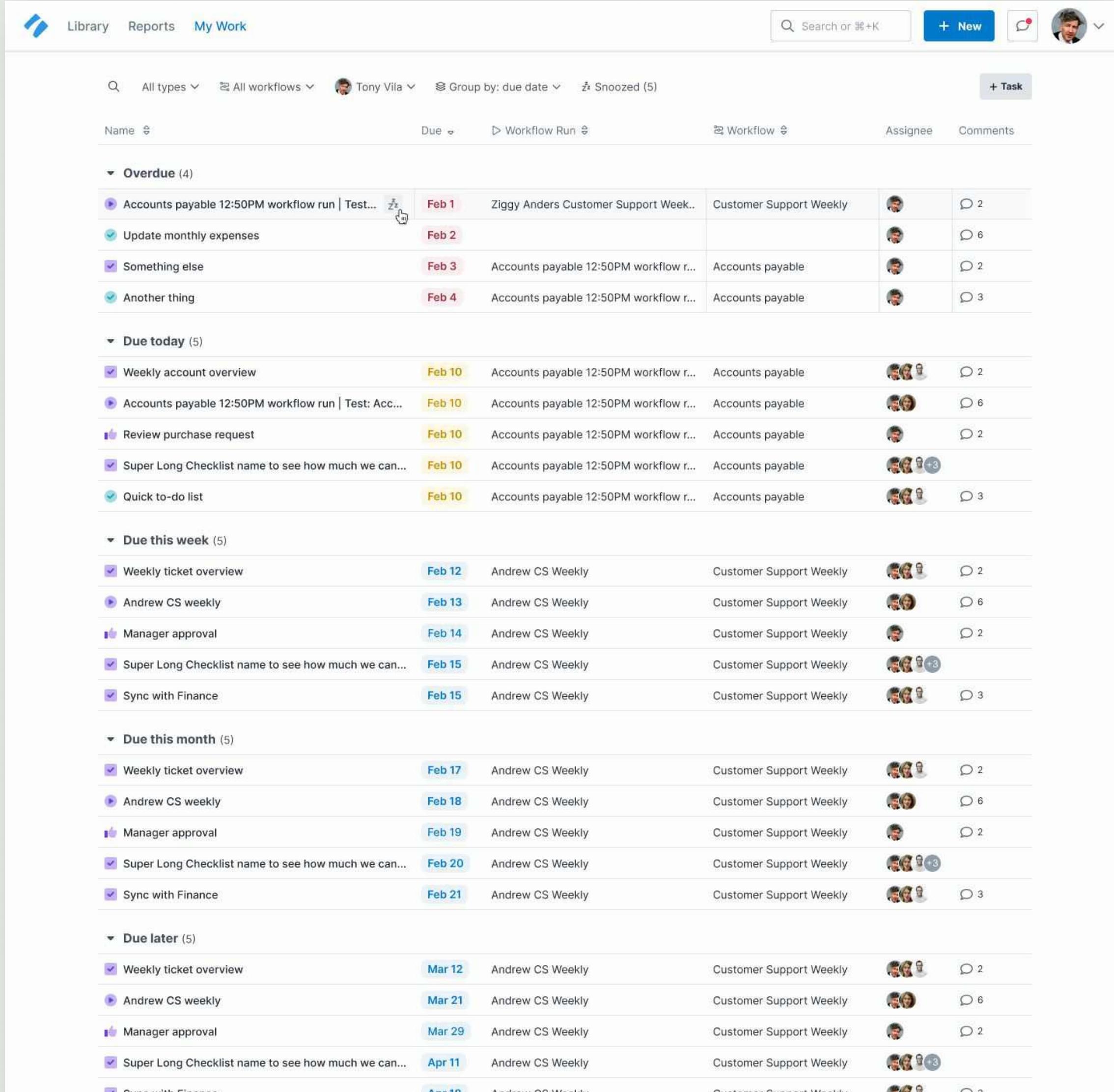
- Give users and managers instant clarity
- Reduce friction
- Support more scalable task management

### Key metrics

- Task completion
- NPS
- Retention rate
- Activation rate

## Solution

# My work



The screenshot shows a 'My Work' inbox interface with the following features and data:

- Header:** Library, Reports, My Work, Search bar, + New, and a user profile.
- Filtering:** All types, All workflows, Group by: due date, Snoozed (5).
- Task List:** Tasks are grouped by due date: Overdue (4), Due today (5), Due this week (5), Due this month (5), and Due later (5).
- Task Details:** Each task row includes a thumbnail, due date, assignee, workflow, and a circular icon representing blockers.
- Example Task:** An 'Accounts payable 12:50PM workflow run | Test...' task is highlighted with a red border and a cursor pointing to its thumbnail.

## Goal

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

## Description

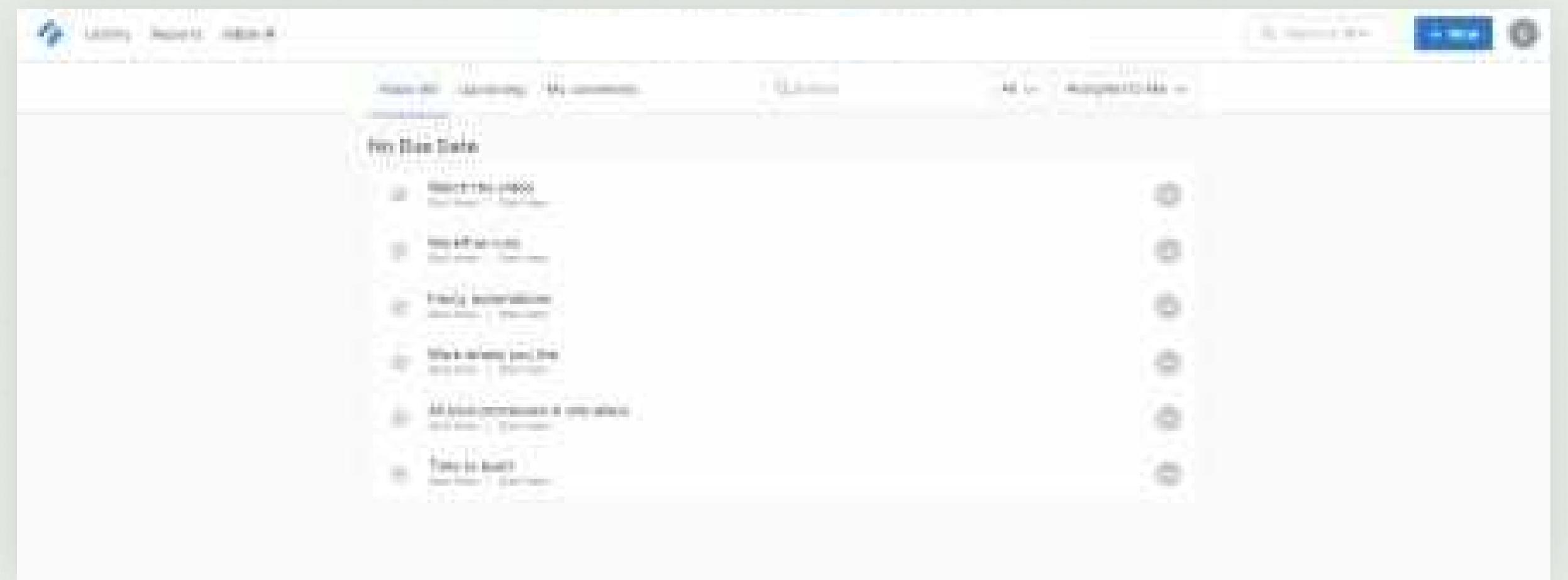
### Inbox (My Work) Redesign:

- **Clear task prioritization** (overdue / upcoming / done)
- Cleaner, **easier-to-scan** task layout
- **Better manager visibility** into ownership & blockers
- **Drawer-based** model replaces modal
- **Improved mobile navigation**

## Impact

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

# Before



# After

The image is a composite screenshot of a project management application, likely Asana, showing various features and a detailed task view.

**Top Bar:** Library, Reports, My Work, Search or **⌘+K**, + New, User Profile.

**Search Bar:** All types, All workflows, Tony Vila, Group by: due date, Snoozed (5).

**Task List:** + Task, Workflow, Assignee, Comments.

**Left Sidebar:** A sidebar with sections for Overdue (4), Due today (5), Due this week (5), Due this month (5), and Due later (5). Each section lists tasks with checkboxes and descriptions. For example, the 'Overdue' section includes 'Accounts payable 12:50PM workflow run | Test: Acc...' and 'Update monthly expenses'.

**Due Date Overlay:** A modal for setting a due date, showing a date picker for '01/26/2024' and a time picker for '3:02PM'. It also shows a calendar for January 2024 with the 26th highlighted in blue.

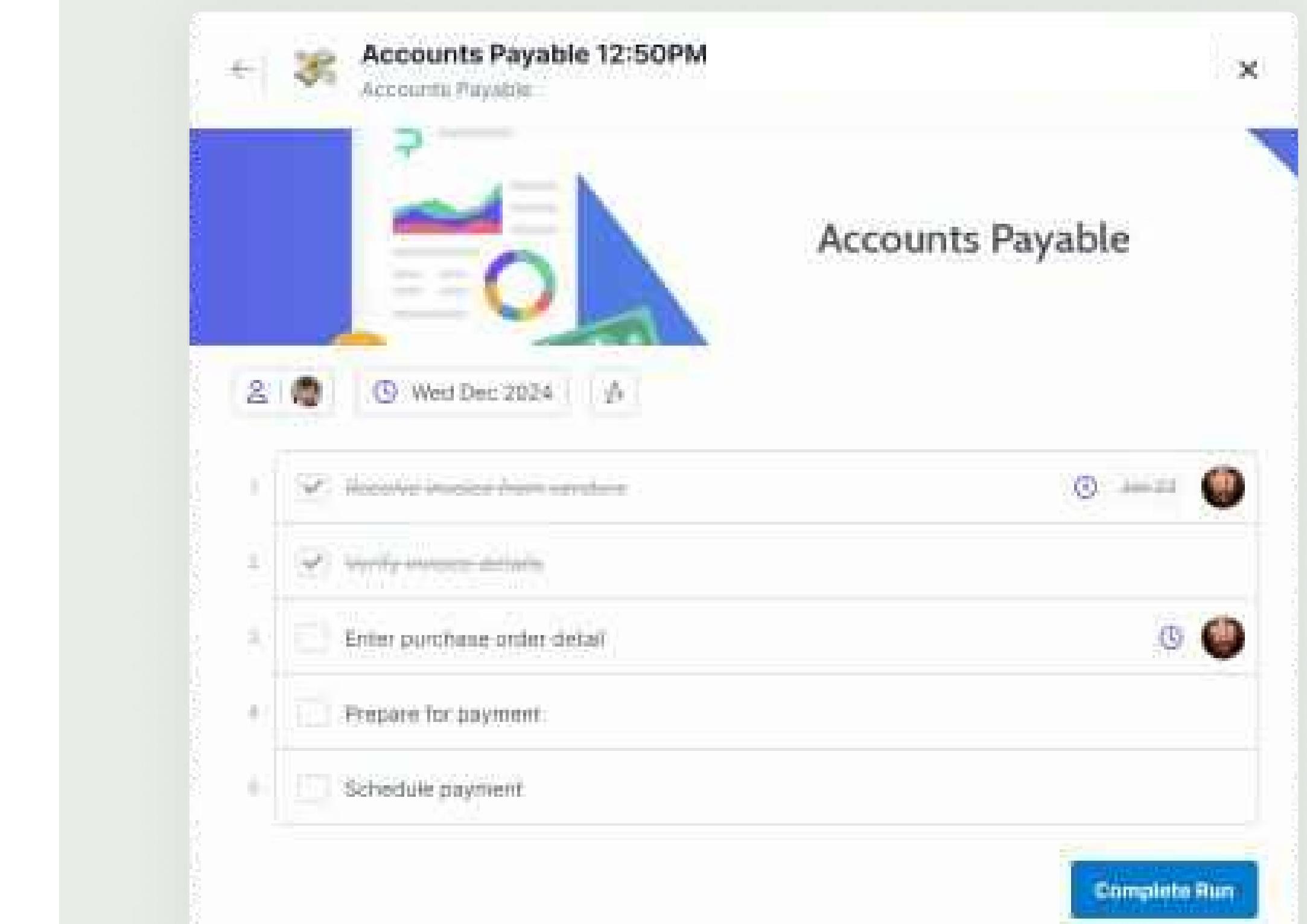
**Table View:** A table showing a list of tasks with columns for Workflow, Assignee, and Comments. Tasks include 'Customer Support Weekly', 'Accounts payable', and 'Accounts payable' multiple times.

**Right Sidebar:** A sidebar with sections for Overdue (4) and Today (5). The 'Overdue' section includes 'Update weekly expenses', 'Update monthly expenses', 'Something else', and 'Another thing'. The 'Today' section includes 'Weekly account overview', 'Accounts payable 12:50PM workflow run | Test', 'Review purchase request', 'Super Long Checklist name to see how much we can...', and 'Quick to-do list'.

**Bottom Task View:** A detailed view of a task titled 'Brian Purchasing Check-up'. It shows a description: 'Review and categorization of transactions to ensure accurate financial records. This effort, undertaken with a commitment to precision, aims to streamline processes, enhance transparency, and contribute to overall organizational efficiency.' It includes an 'Add attachment' button, a 'SUBTASKS' section with a checked checkbox for 'Scan all receipts', and a 'Complete' button.

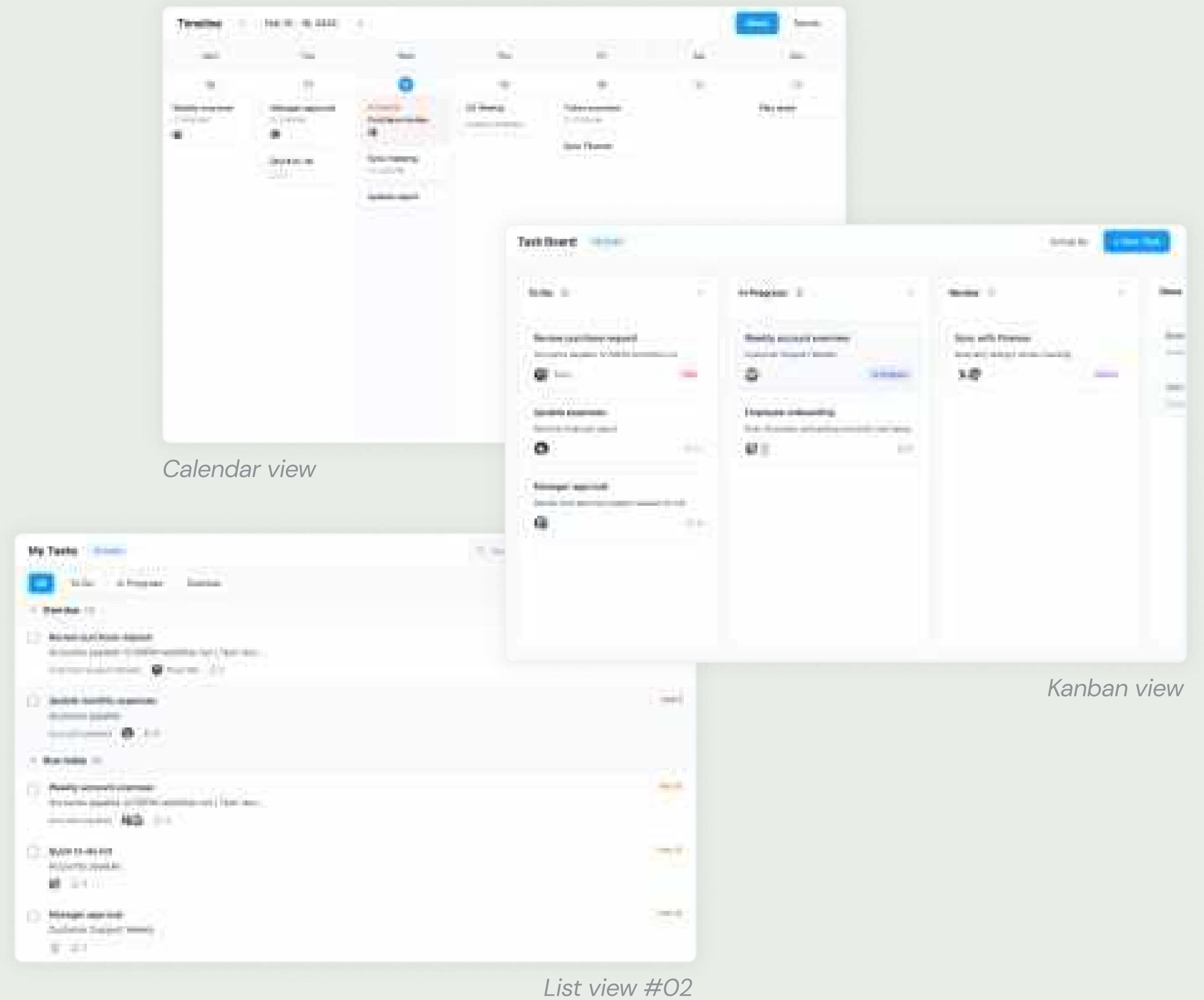
# Process

1. Aligned with stakeholders on goals and constraints, grounded in user needs and data.
2. Defined the core experience before designing features.
3. Explored and validated solutions through rapid iteration and feedback (*internal and external*).
4. Collaborated closely with Engineering to deliver a scalable, user-focused solution.
5. Evaluated outcomes and iterated based on impact.



We chose a condensed list view based on feedback because it enables faster scanning and prioritization across many tasks, without the overhead of Kanban or calendar views.

*Future iterations planned to add AI-prioritized calendar and Kanban views.*



## Results

# Clearer, Faster Task Management

**15%**

**reduction in  
overdue tasks**  
*(better prioritization  
and visibility)*

**+8%**

**increase in task  
completion rate**

**+25%**

**improved task  
comprehension in  
usability tests**

“

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

# *Key Takeaways*

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

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## What we learned

- **Clarity first:** Users need a clear starting point.
- **Context matters:** Role, intent, and metadata build confidence.
- **Enable momentum:** Remove blank states and surface priorities.
- **Serve dual audiences:** Balance simplicity for new users with depth for power users.
- **Details add up:** Hierarchy, spacing, and cues reduce friction and improve comprehension.

## What I'd Do Differently

- **AI onboarding:** Early prompts lacked role/company context; refining them boosted trust and relevance.
- **Inbox design:** Simplifying states and hierarchy sooner would've eased complexity and cut redesign cycles.
- **Measurement:** Overlapping launches made attribution hard; spaced rollouts or clearer tracking would help.

*Thanks!*

[indianacaba@gmail.com](mailto:indianacaba@gmail.com) • [indianacaba.me](http://indianacaba.me)