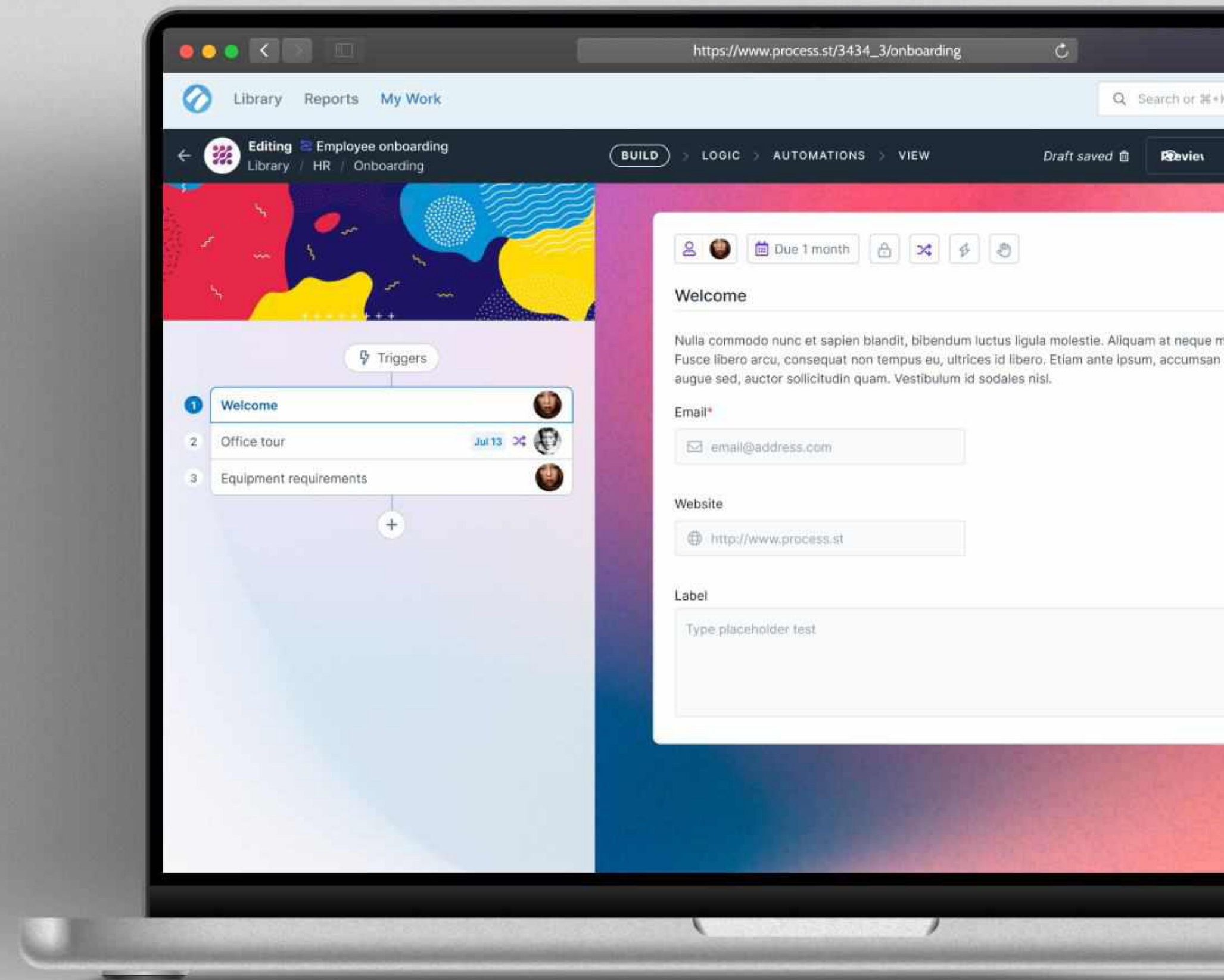


Indiana Caba

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



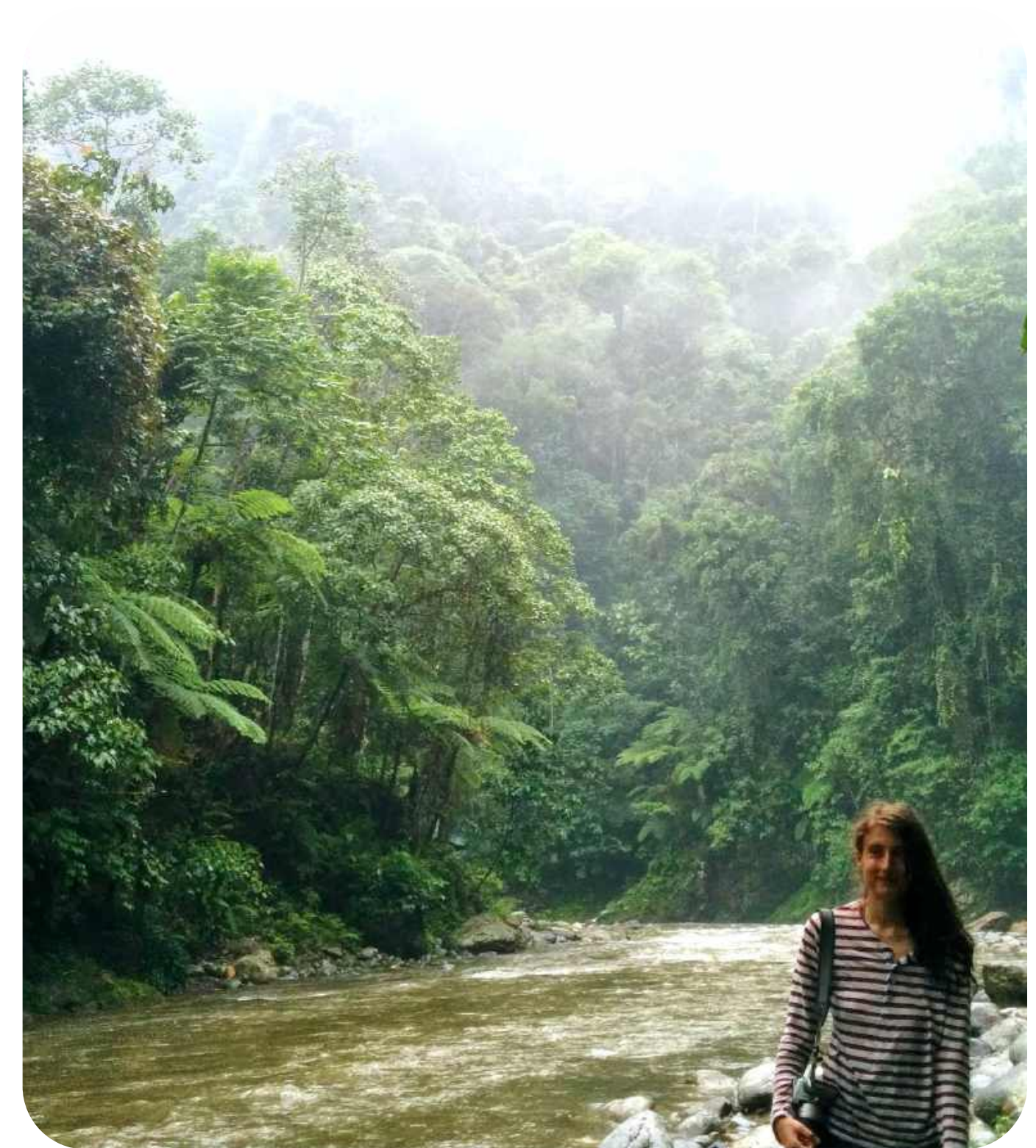
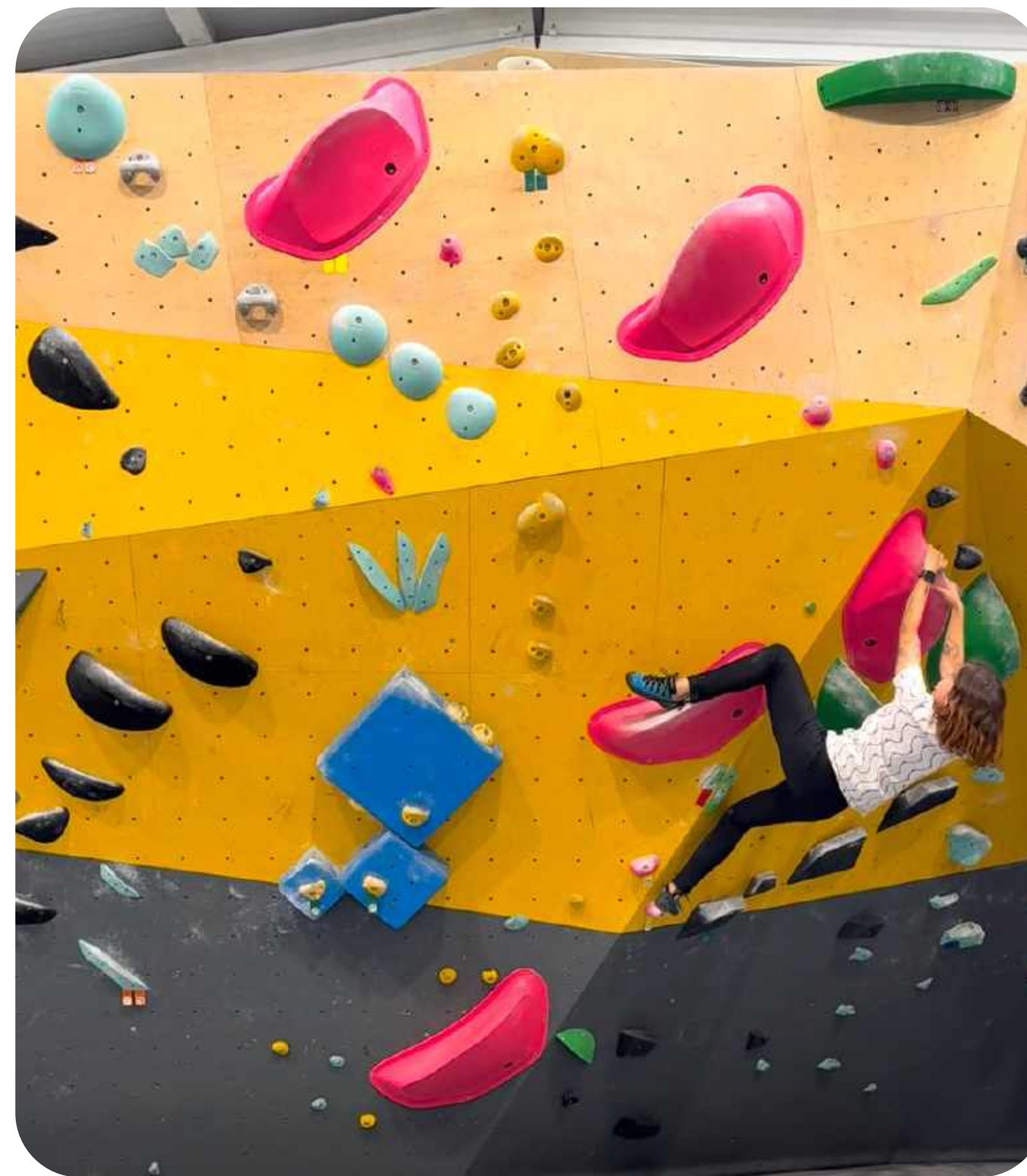
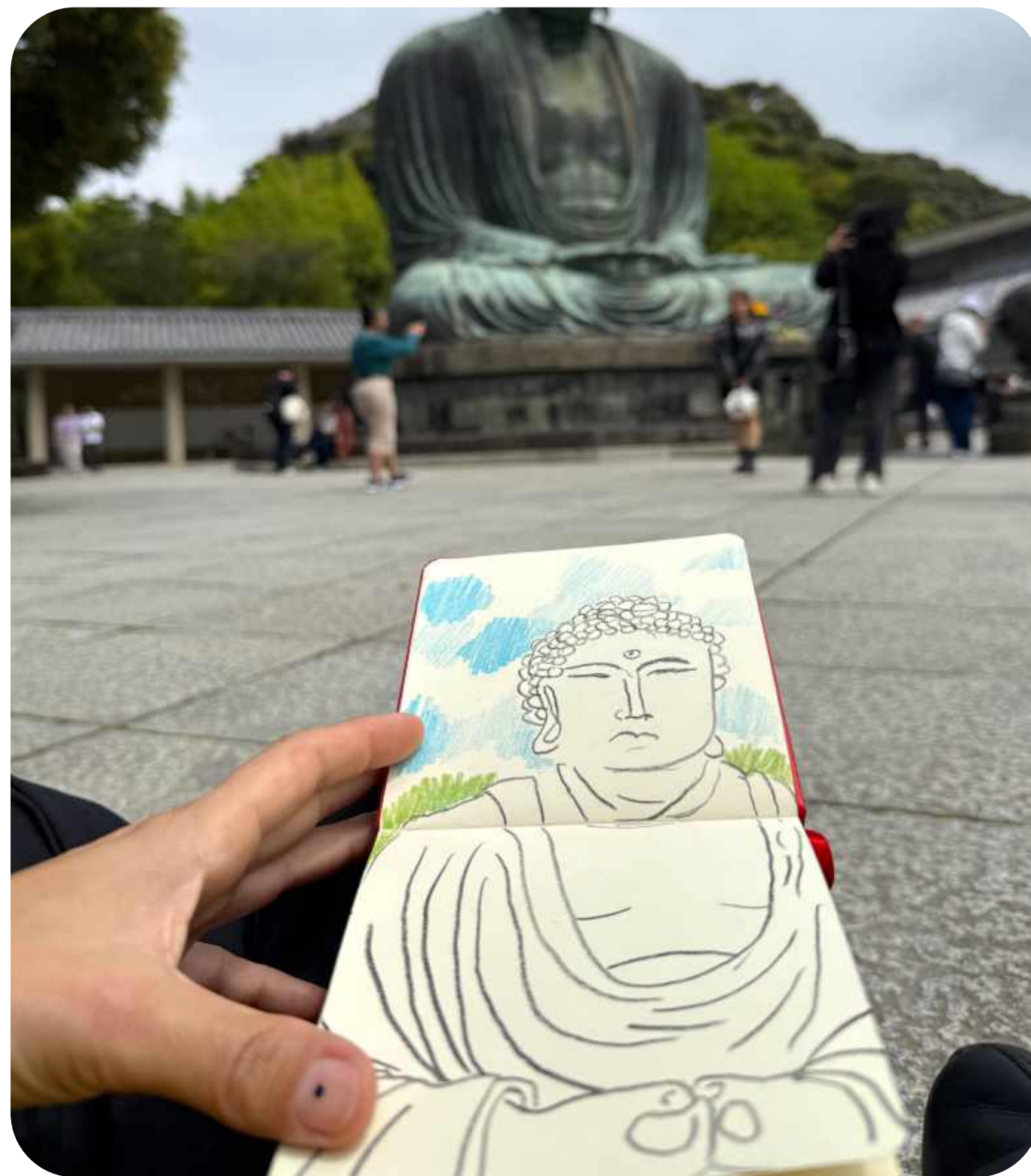
Lead Product Designer at **EnjoyHQ**
2016–2017



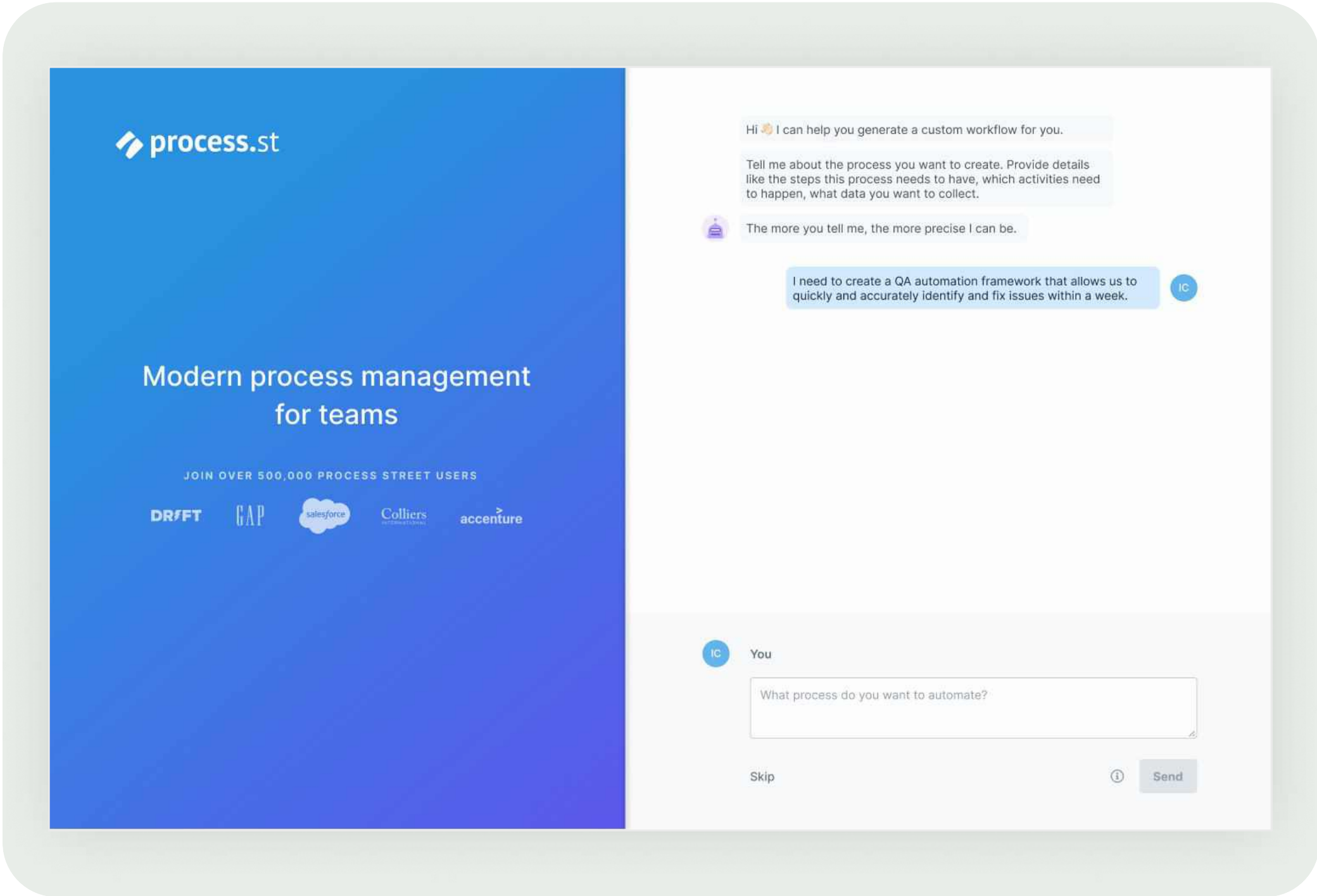
Communication & Media Studies
BA & MA, Complutense University
2005–2015

About me

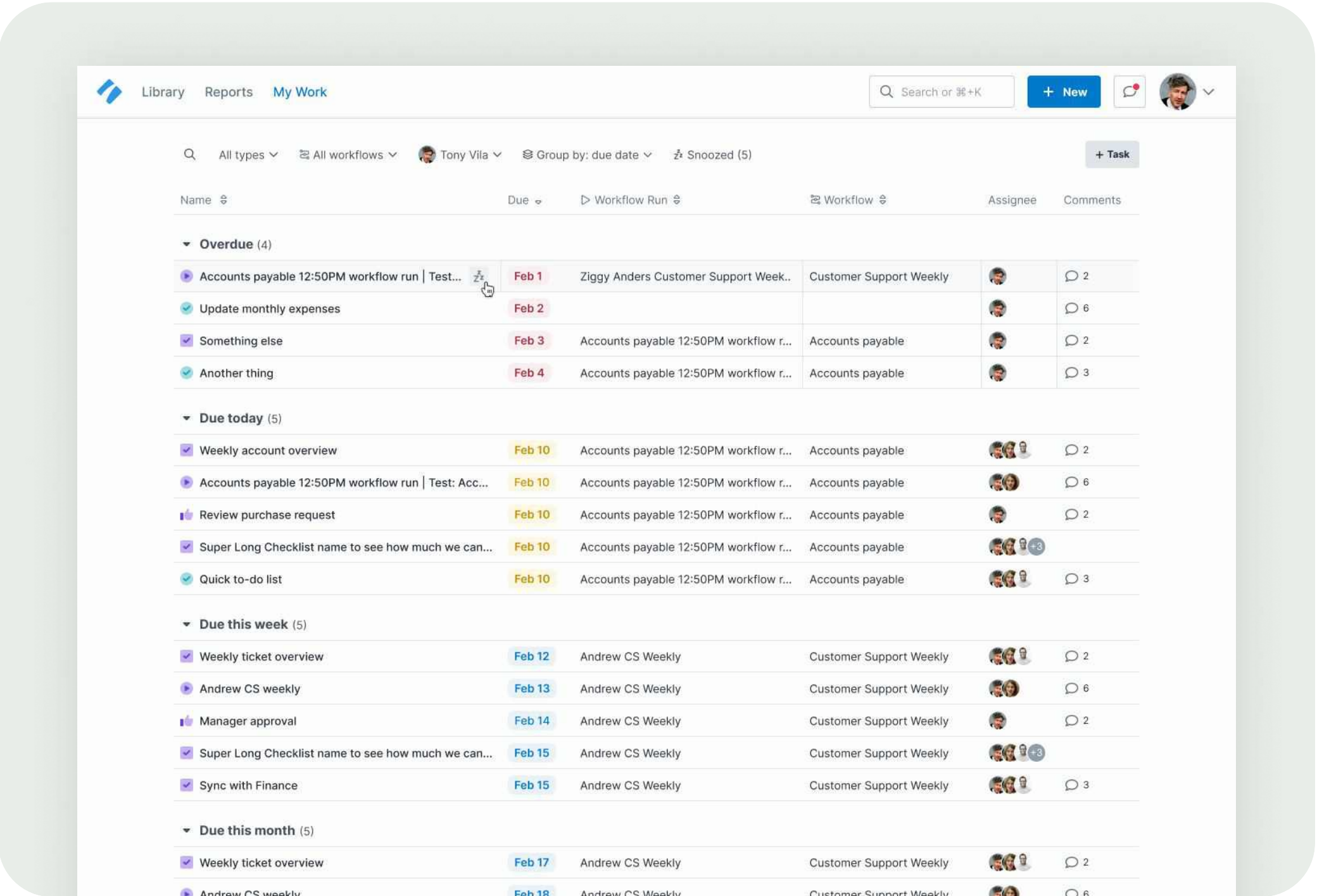
Outside of product design, here's what keeps me inspired



Selected projects



AI-Powered Workflows
Process Street, 2025



Inbox, Made Clear
Process Street, 2024

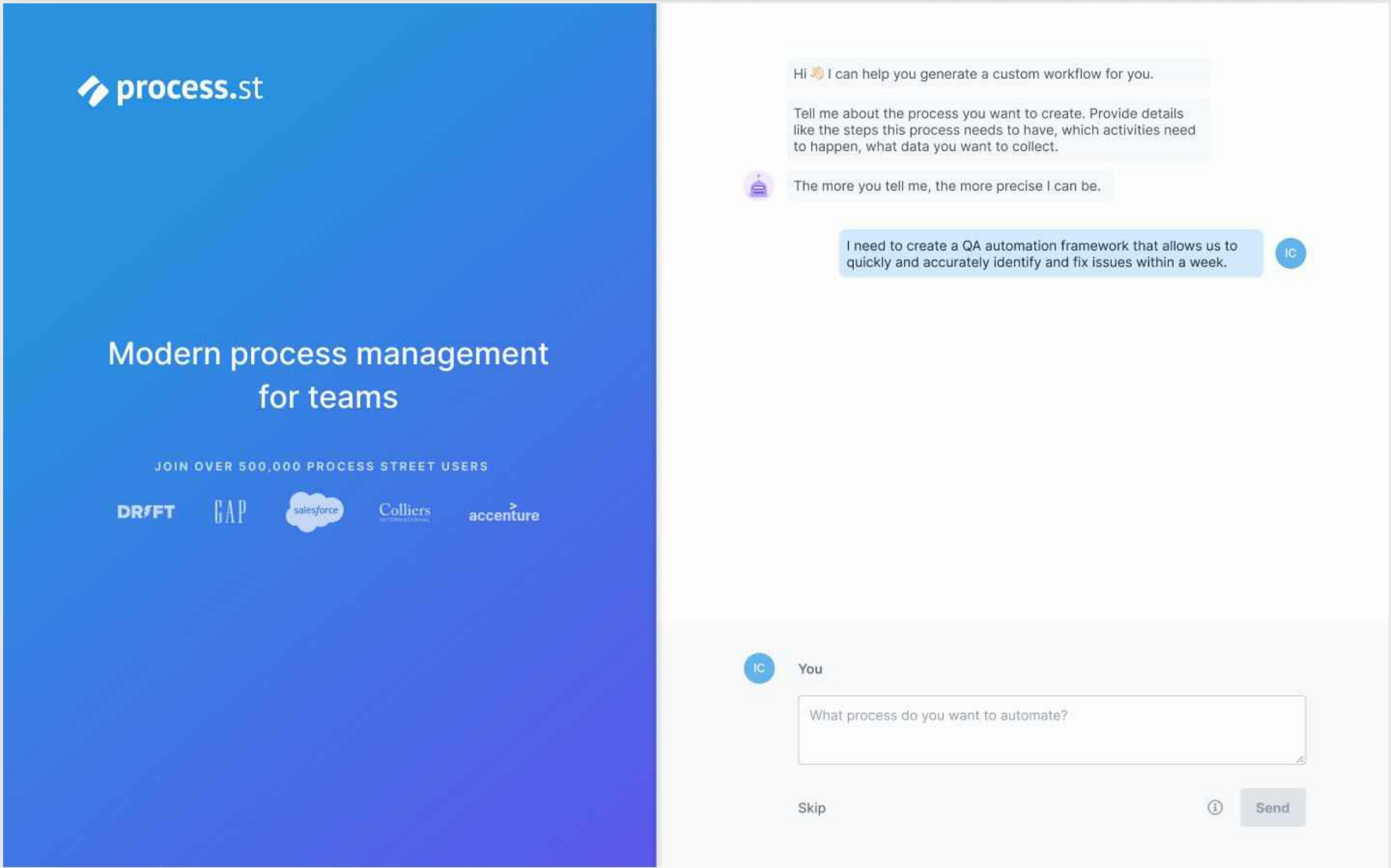
AI-Powered Workflows



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?

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.

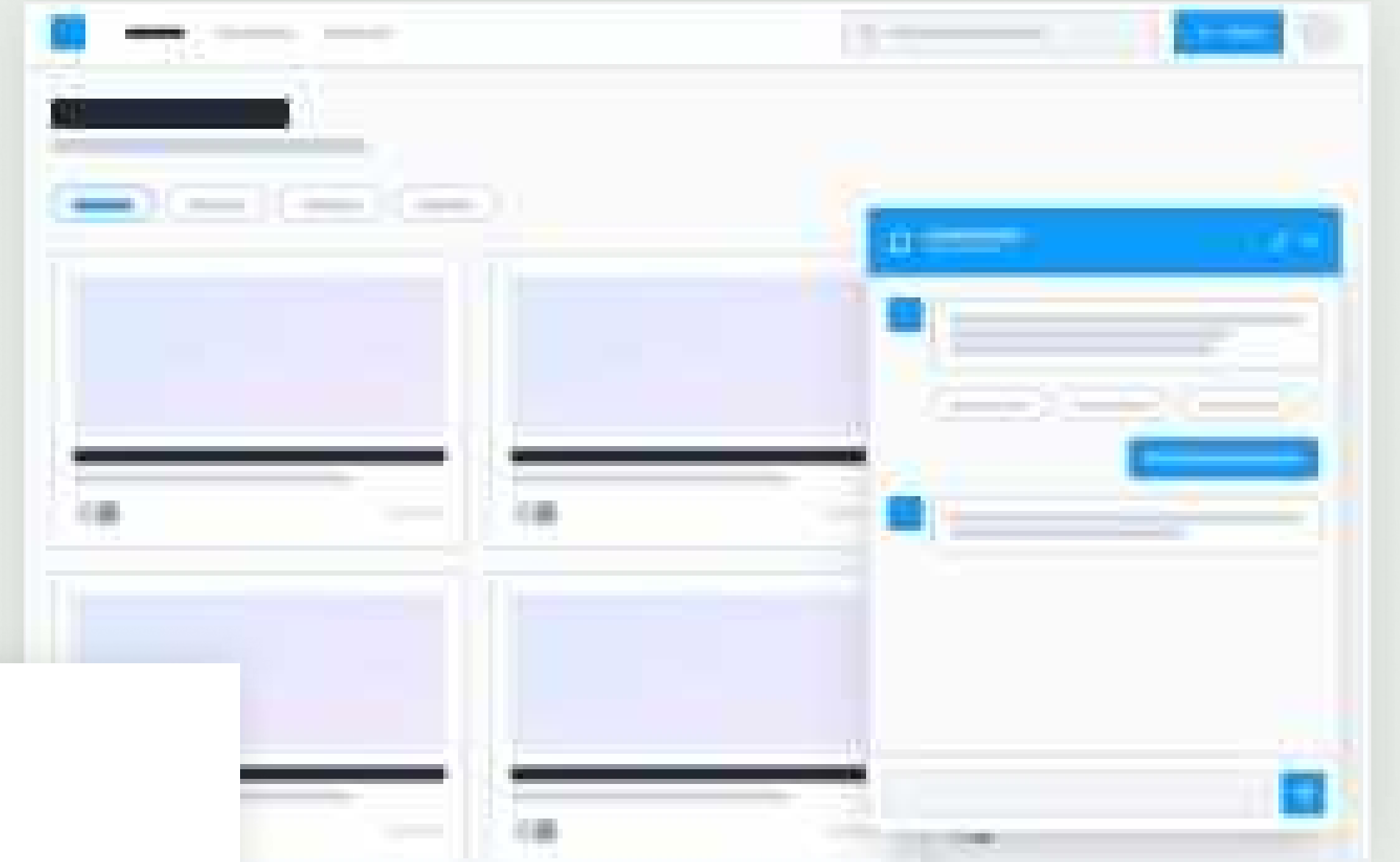
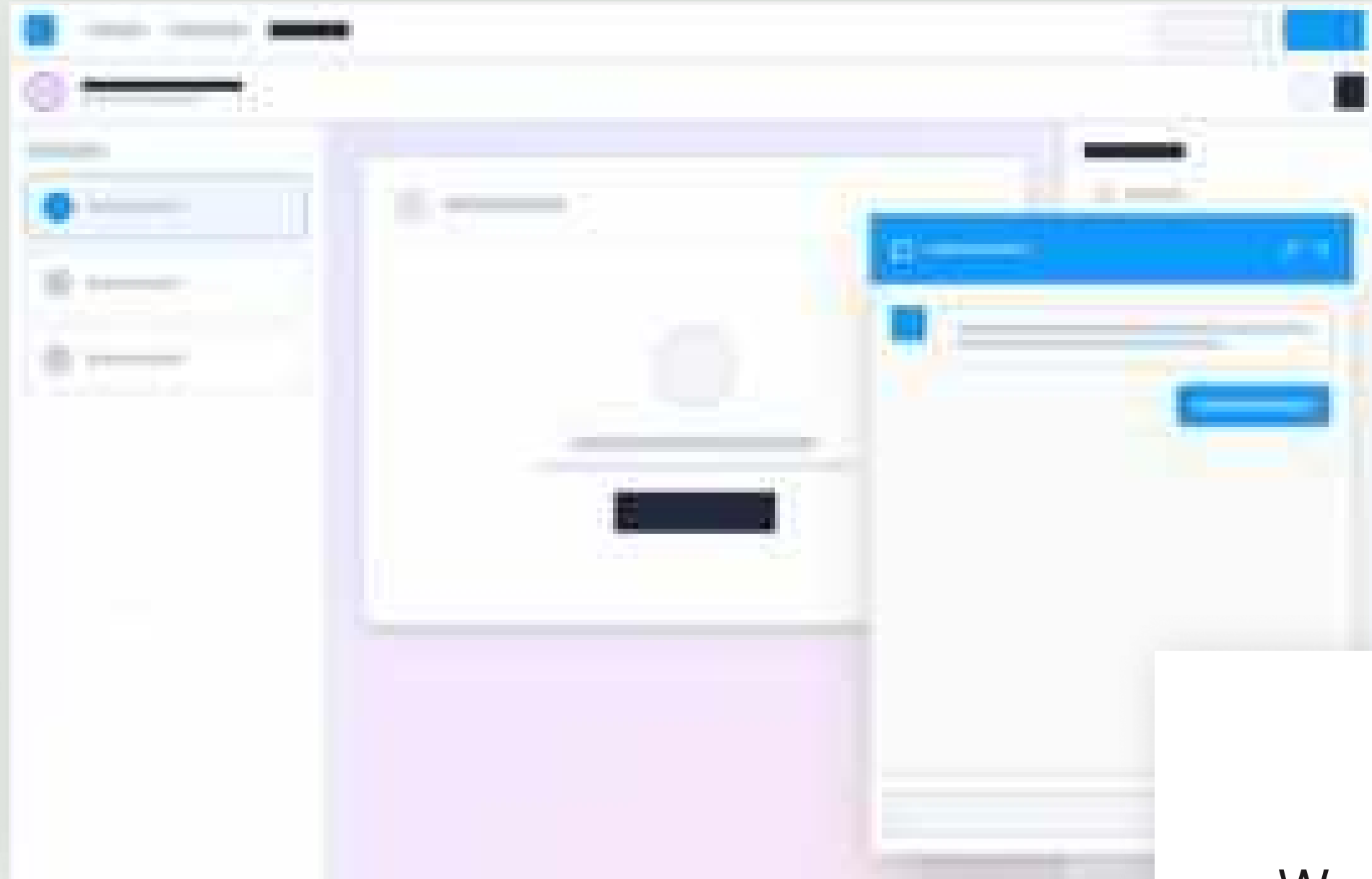
→ Added an **explanation layer** to show why each step was suggested and build trust.

→ 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.

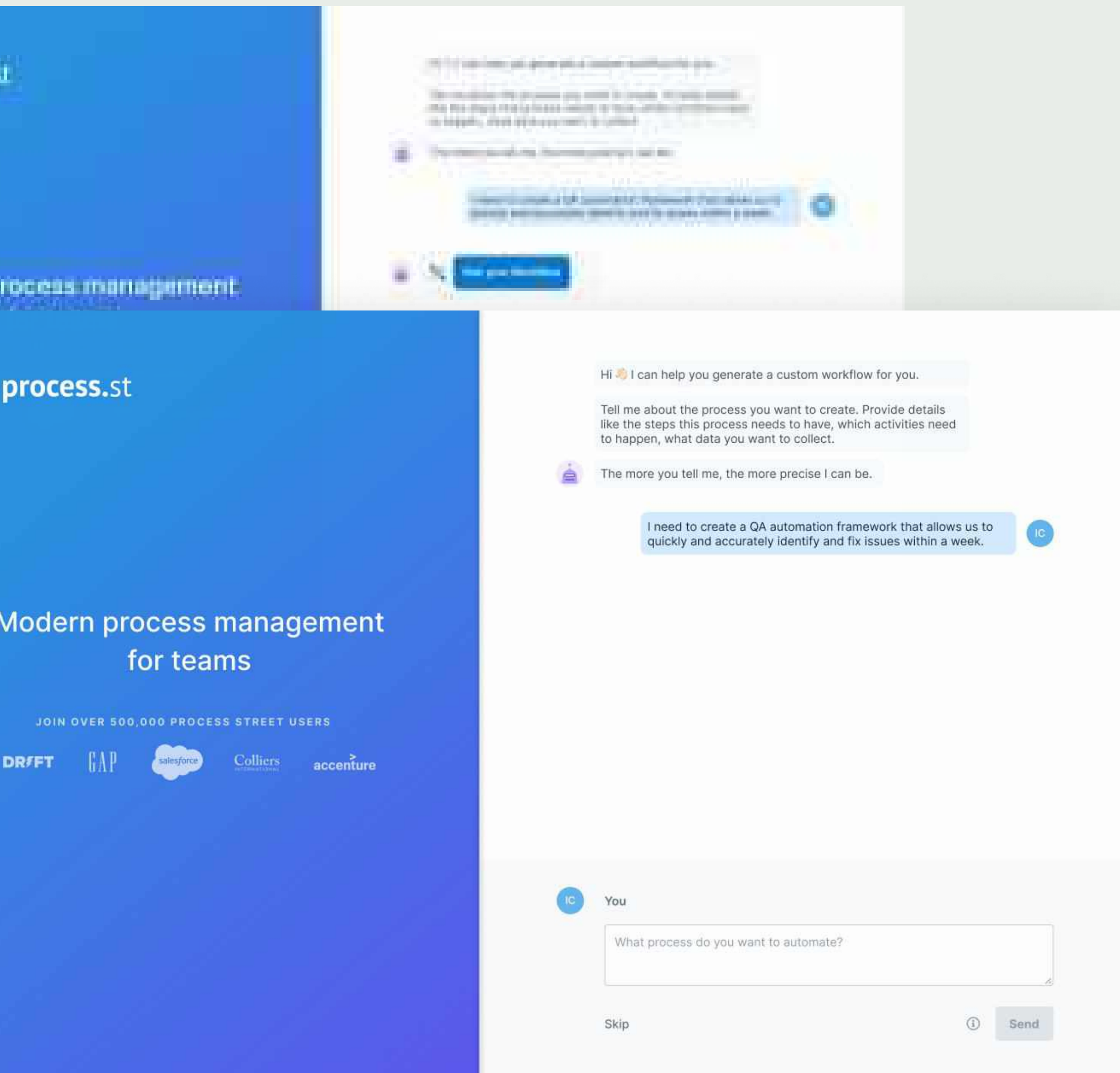
The screenshot displays the 'Process AI' interface, which is a tool for generating workflows. The main window has a purple header with the title 'Process AI' and a close button. Below the header, there's a section for 'Workflow Name' with a text input field containing the placeholder 'e.g., "Employee Onboarding via Slack"'. A note below the input field states: 'We use Process AI to generate workflows for you. Specific workflow names work best. [Learn more.](#)'. Below this is a section titled 'ADVANCED SETTINGS' with a dropdown arrow. It contains five settings, each with a toggle switch: 'Task assignments' (checked), 'Due dates' (checked), 'Stop tasks' (checked), 'Variables' (checked), and 'Approvals' (checked). Each setting has a brief explanation of the feature. At the bottom right of the main window is a blue button labeled 'Generate with AI'. In the background, there's a smaller window titled 'Test AI Task' with a 'Product marketing' tab. It shows a list of instructions for creating a workflow, including fields for Topic, Objective, Description, SEO Terms, Target Audience, and Brand Voice, each with a placeholder like '{{ADD.VALUE}}'. Below the instructions is a 'Role' section with a text input field and a 'Product release' section with another text input field. At the bottom of this window 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.

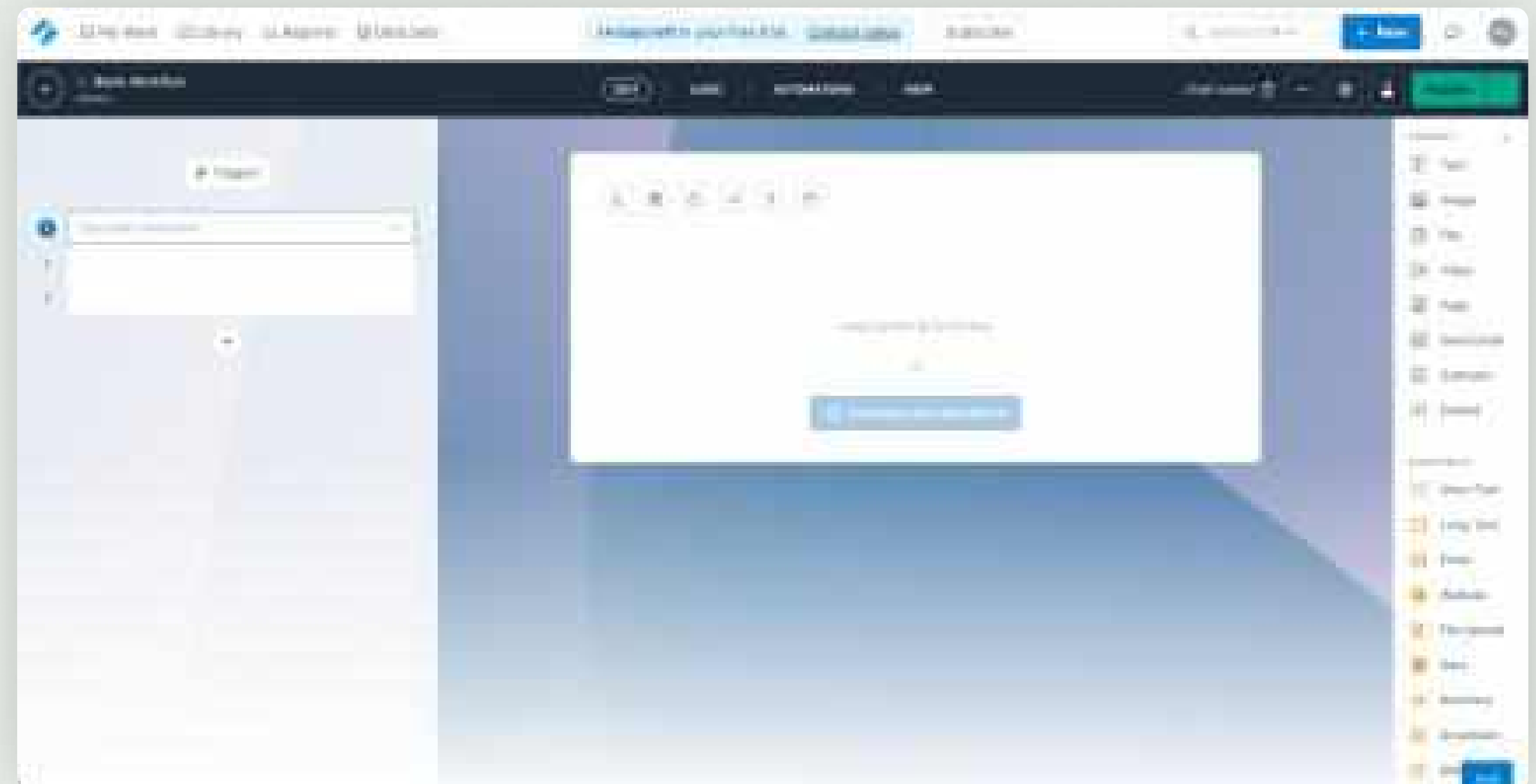
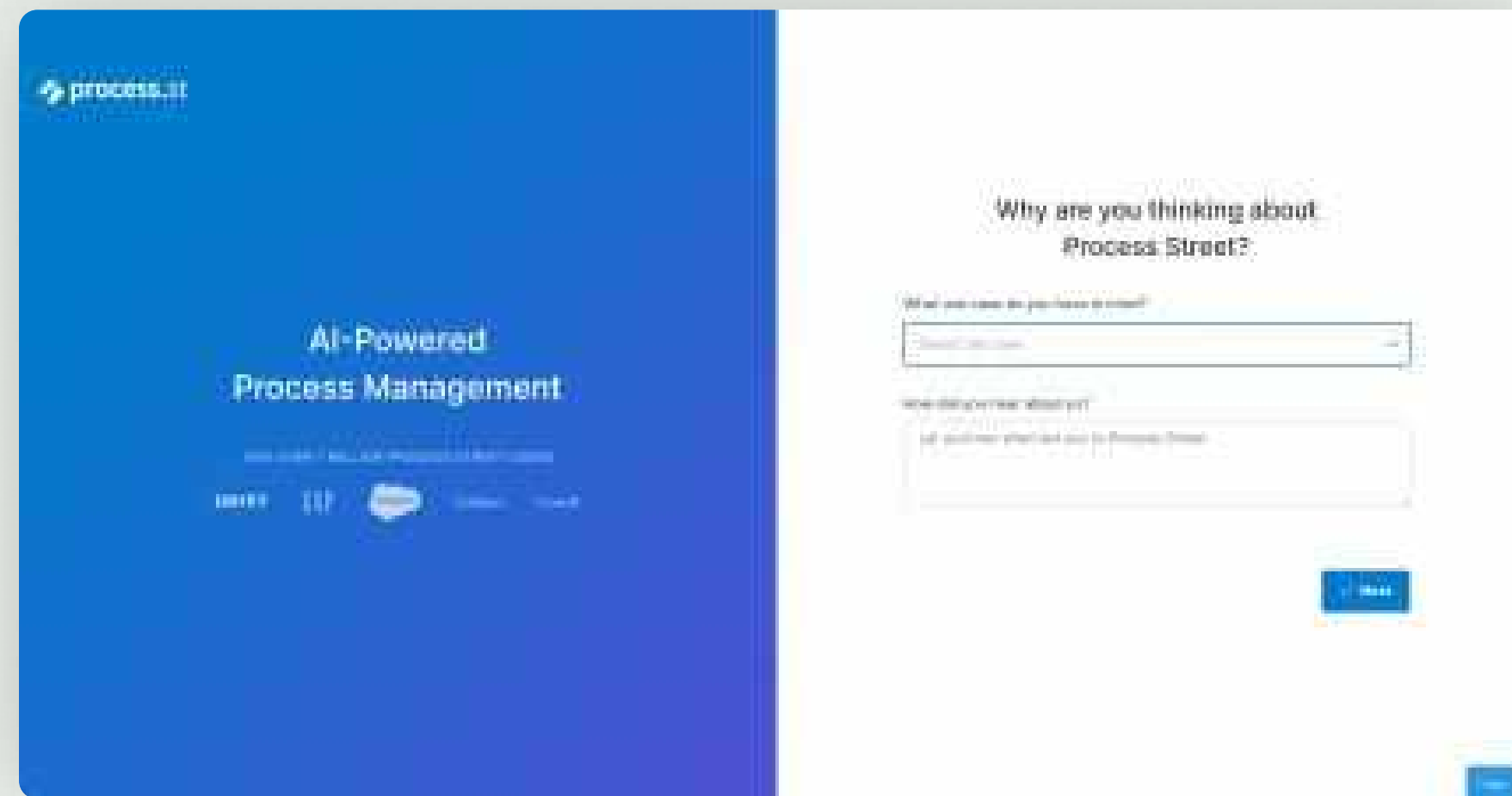
Description

- 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

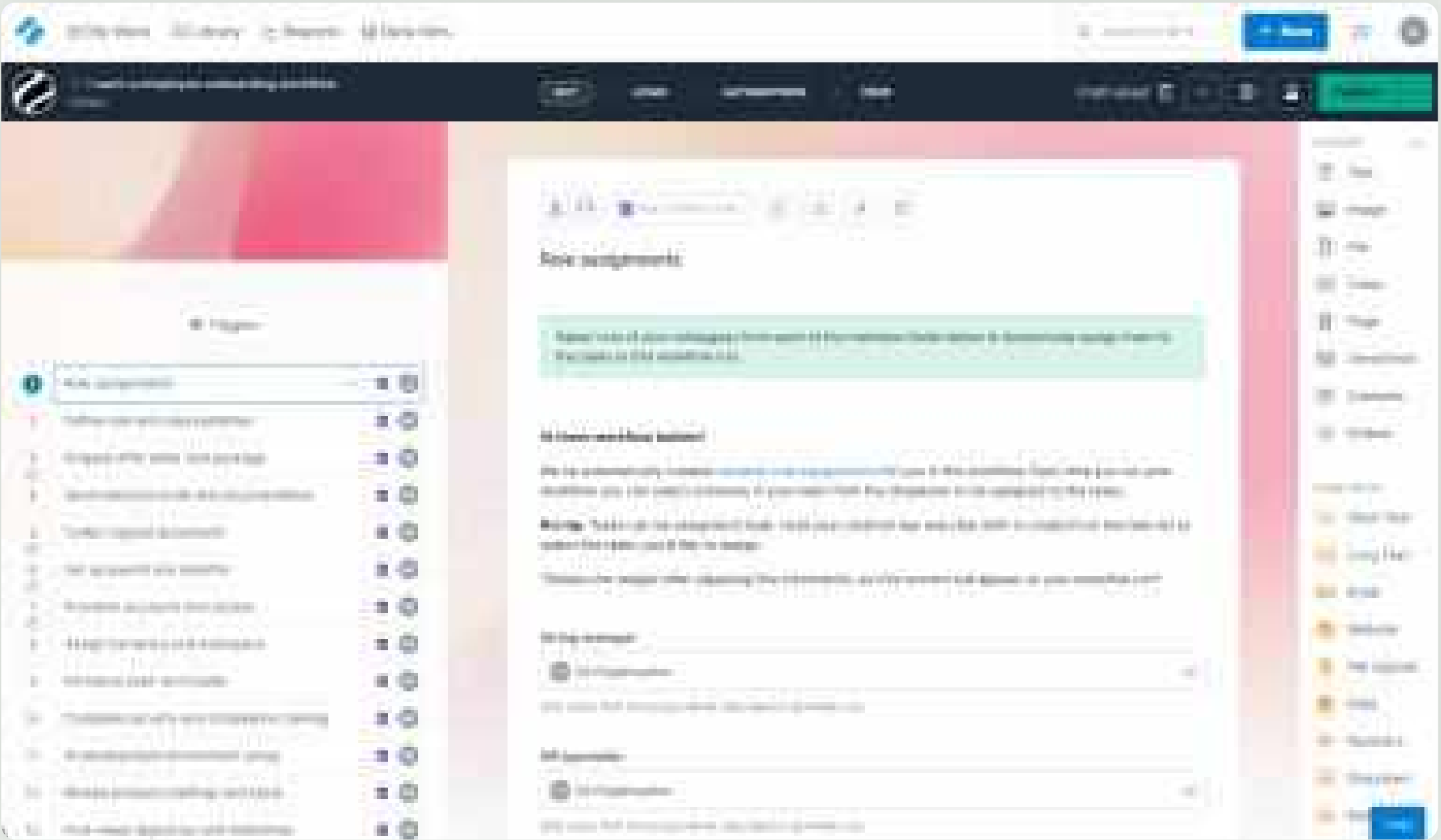
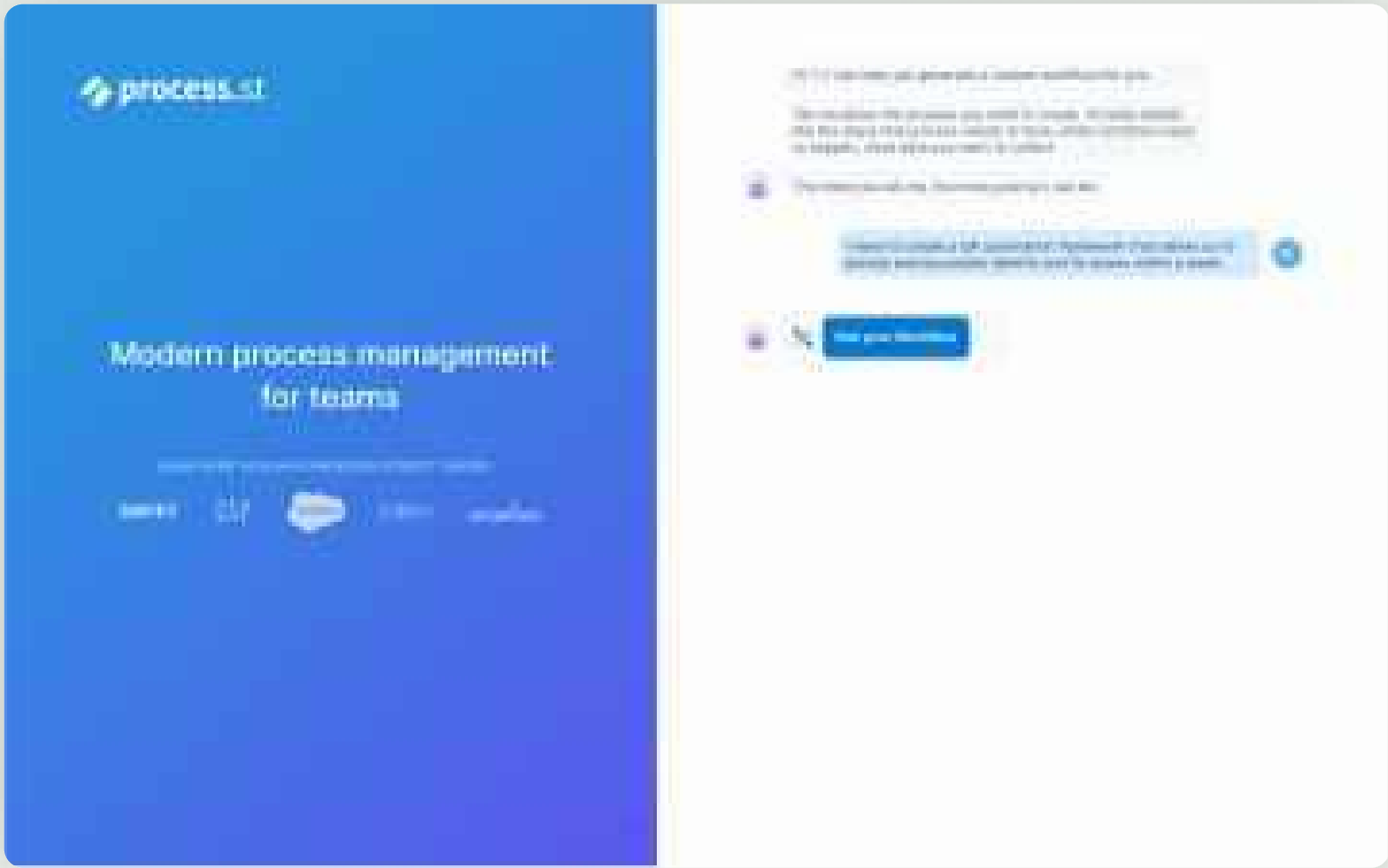
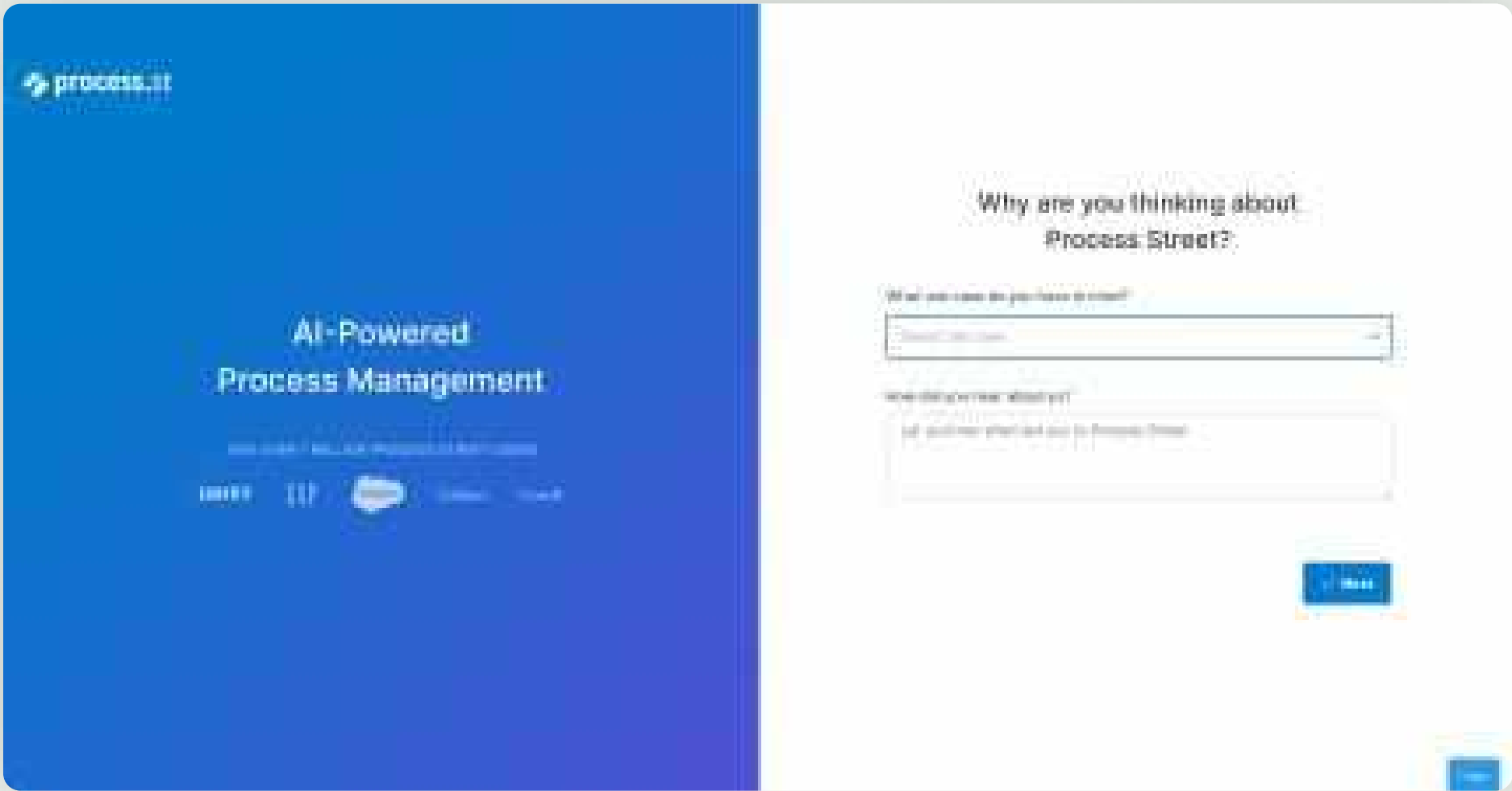
Reduced blank-page anxiety, improved activation, and built early confidence in AI as a helpful collaborator.

Before



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

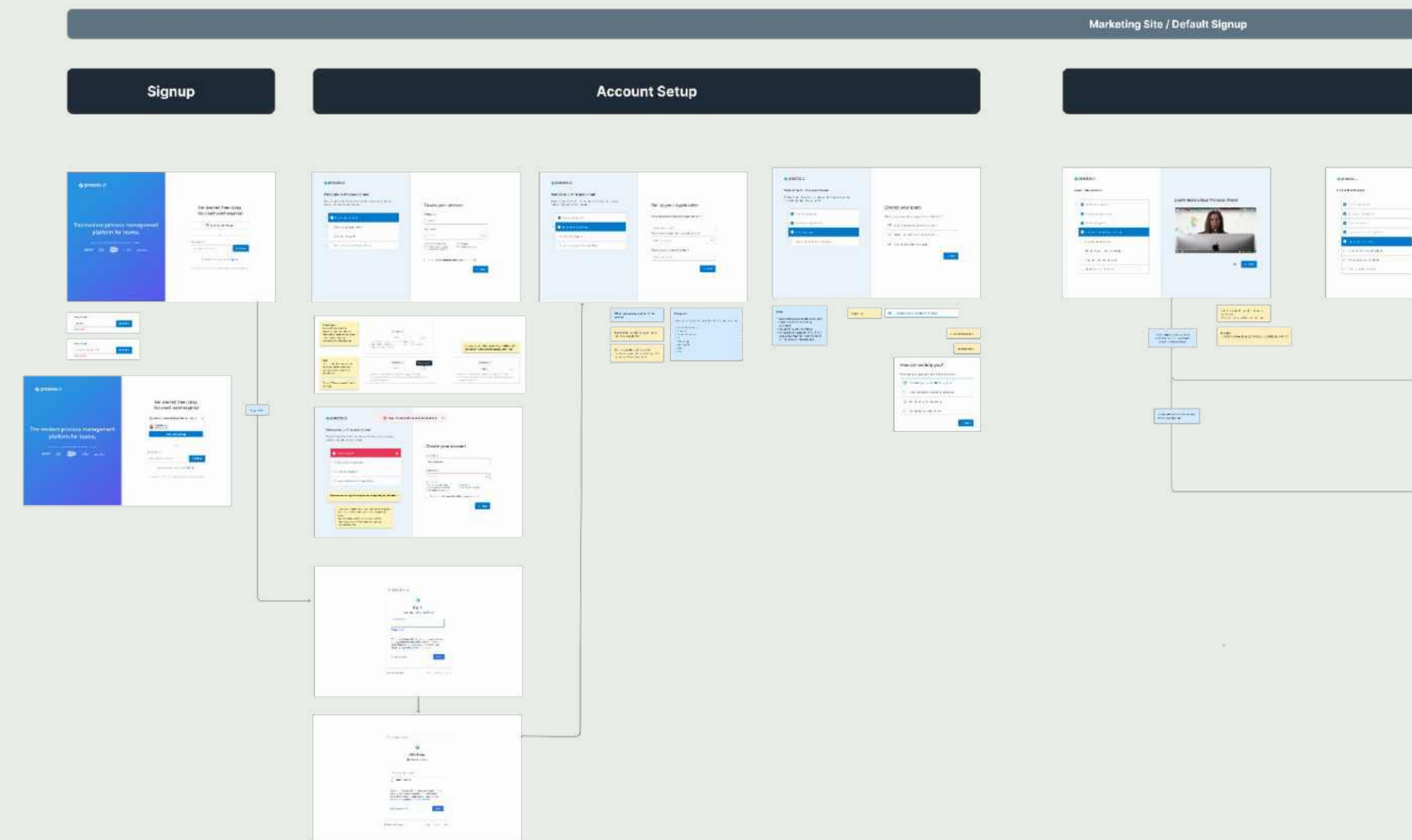
After



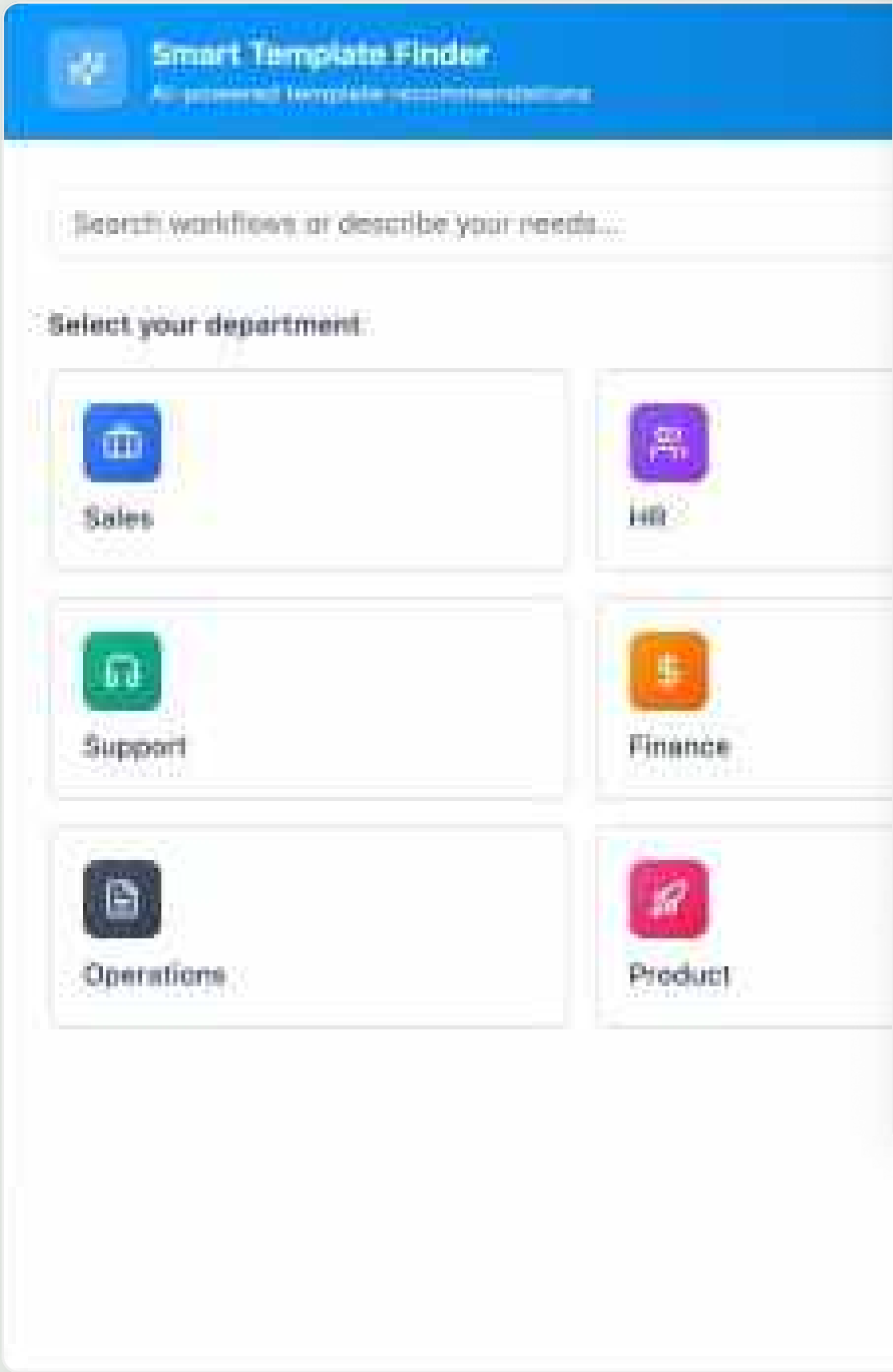
After the standard onboarding flow, users landed directly in an AI-generated workflow tailored to their problem, company, and industry. We also added a step-by-step guide to walk them through setup.

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.



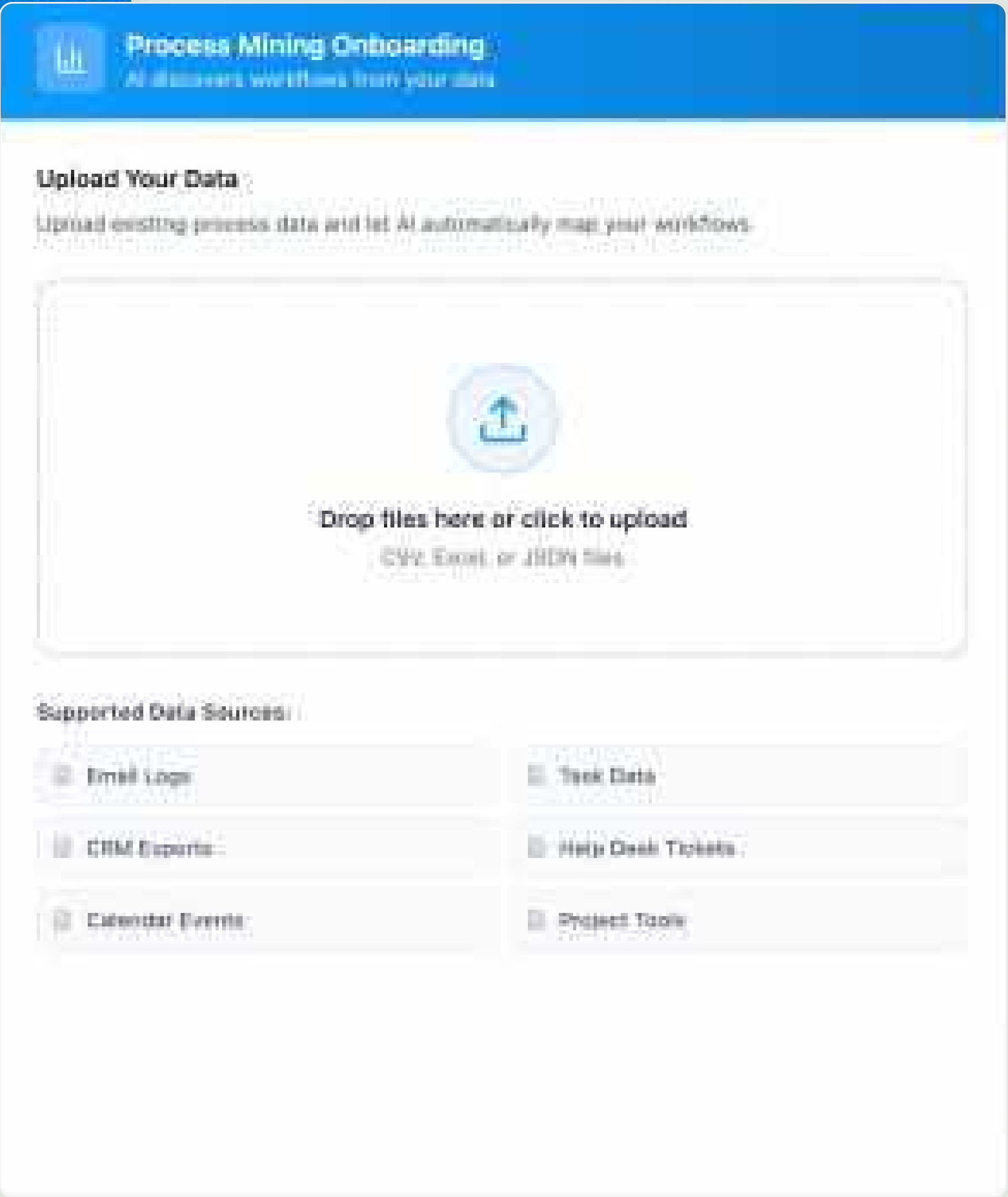
We explored multiple AI onboarding concepts with different cost trade-offs, testing them internally and with power users.



Smart templates



Guided builder



Process mining

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

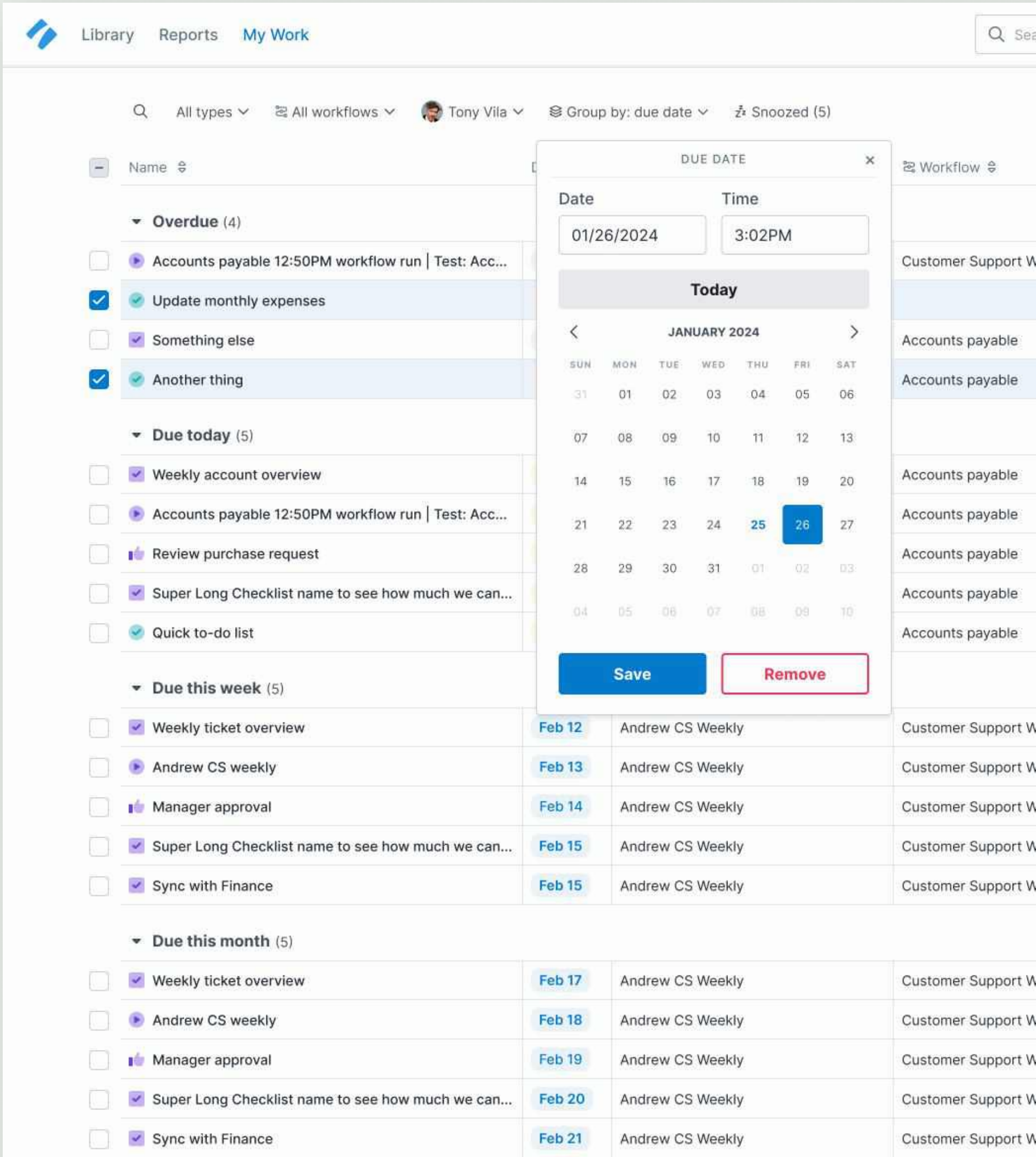
Inbox, Made Clear



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 challenge

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

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

Goal

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

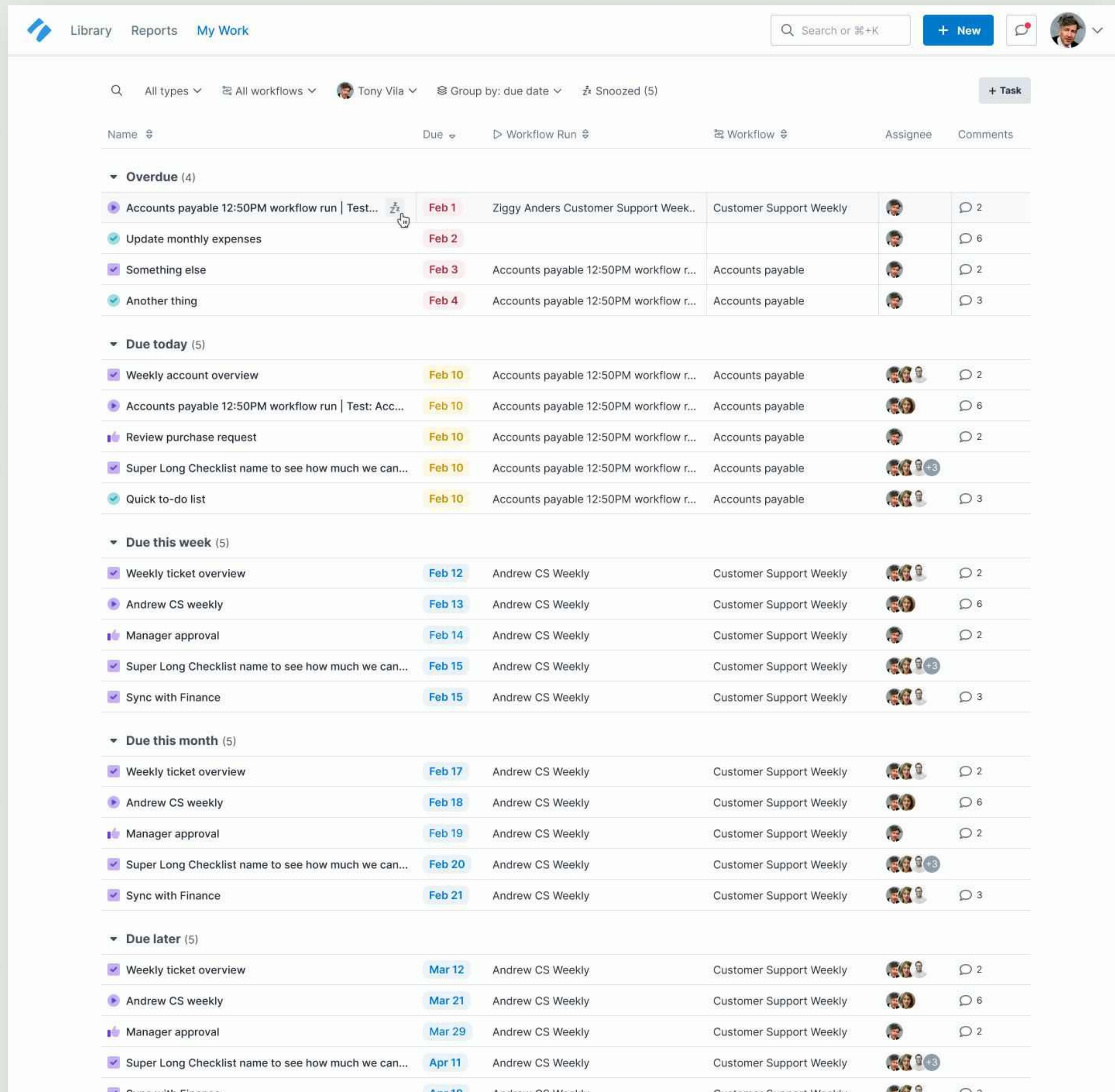
Description

Inbox (My Work) Redesign:

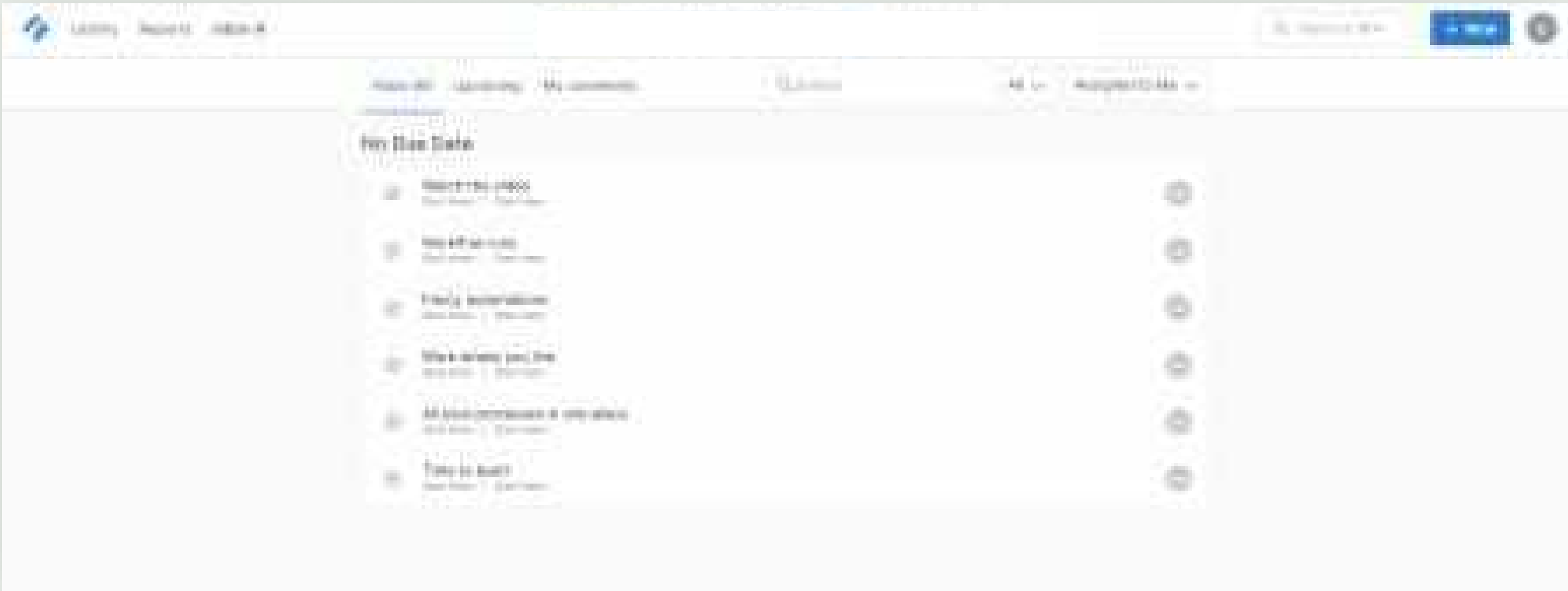
- **Clear task prioritization** (overdue / upcoming / done)
- Cleaner, **easier-to-scan** task layout
- **Better manager visibility** into ownership & blockers
- **Drawer-based** model replaces modal
- **Improved mobile navigation**

Impact

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



Before



After

LibraryReportsMy Work

Search or 器+K

+ New

Q All types ▾ All workflows ▾ Tony Vila ▾ Group by: due date ▾ Snoozed (5)

Name ▾

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

☐

Andrew CS weekly

☐

Manager approval

☐

Super Long Checklist name to see how much we can...

☐

Sync with Finance

Due this month (5)

☐

Weekly ticket overview

☐

Andrew CS weekly

☐

Manager approval

☐

Super Long Checklist name to see how much we can...

☐

Sync with Finance

Due later (5)

☐

Weekly ticket overview

☐

Andrew CS weekly

☐

Manager approval

☐

Super Long Checklist name to see how much we can...

☐

Sync with Finance

Workflow ▾

Assignee

Comments

Customer Support Weekly

2

6

Accounts payable

2

Accounts payable

3

Accounts payable

2

Accounts payable

6

Accounts payable

2

Accounts payable

3

Accounts payable

3

Accounts payable

3

Save

Remove

2 selected

Reassign

Due date

Mark as completed

Snooze

Search

Overdue (4)

Name ▾

Update weekly expenses

Update monthly expenses

Something else

Another thing

Today (5)

Name ▾

Weekly account overview

Accounts payable 12:50PM workflow run | Test

Review purchase request

Super Long Checklist name to see how much v

Quick to-do list

LibraryReportsMy Work

Search or 器+K

+ New

Accounts Payable

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.

Add attachment

Subtasks

☒

Scan all receipts

☐ Verify and input new sales figures into the designated columns of the spreadsheet, incorporating any adjustments or corrections as necessary.

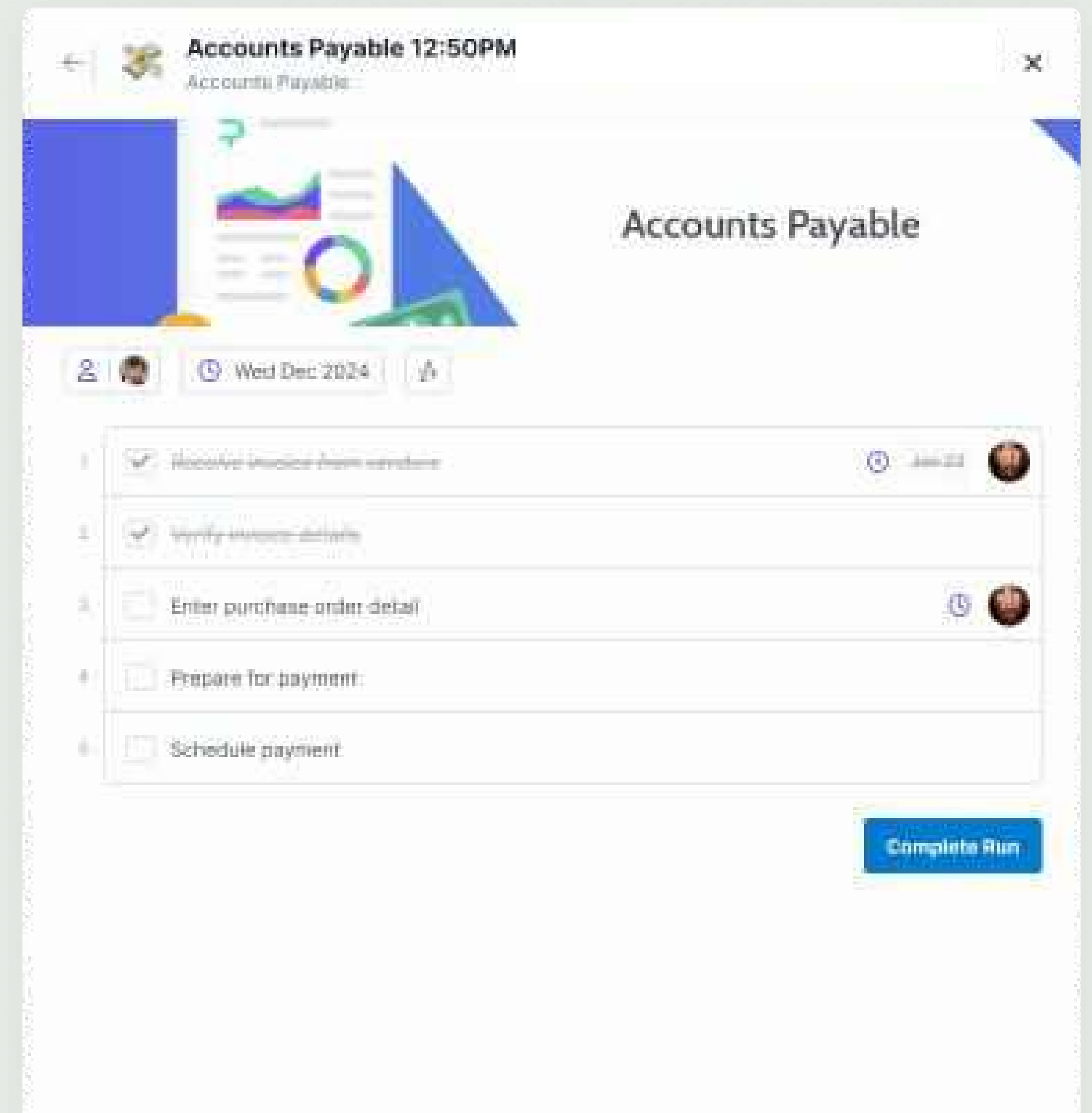
Complete

Write a comments... Type @ to mention other users

Send

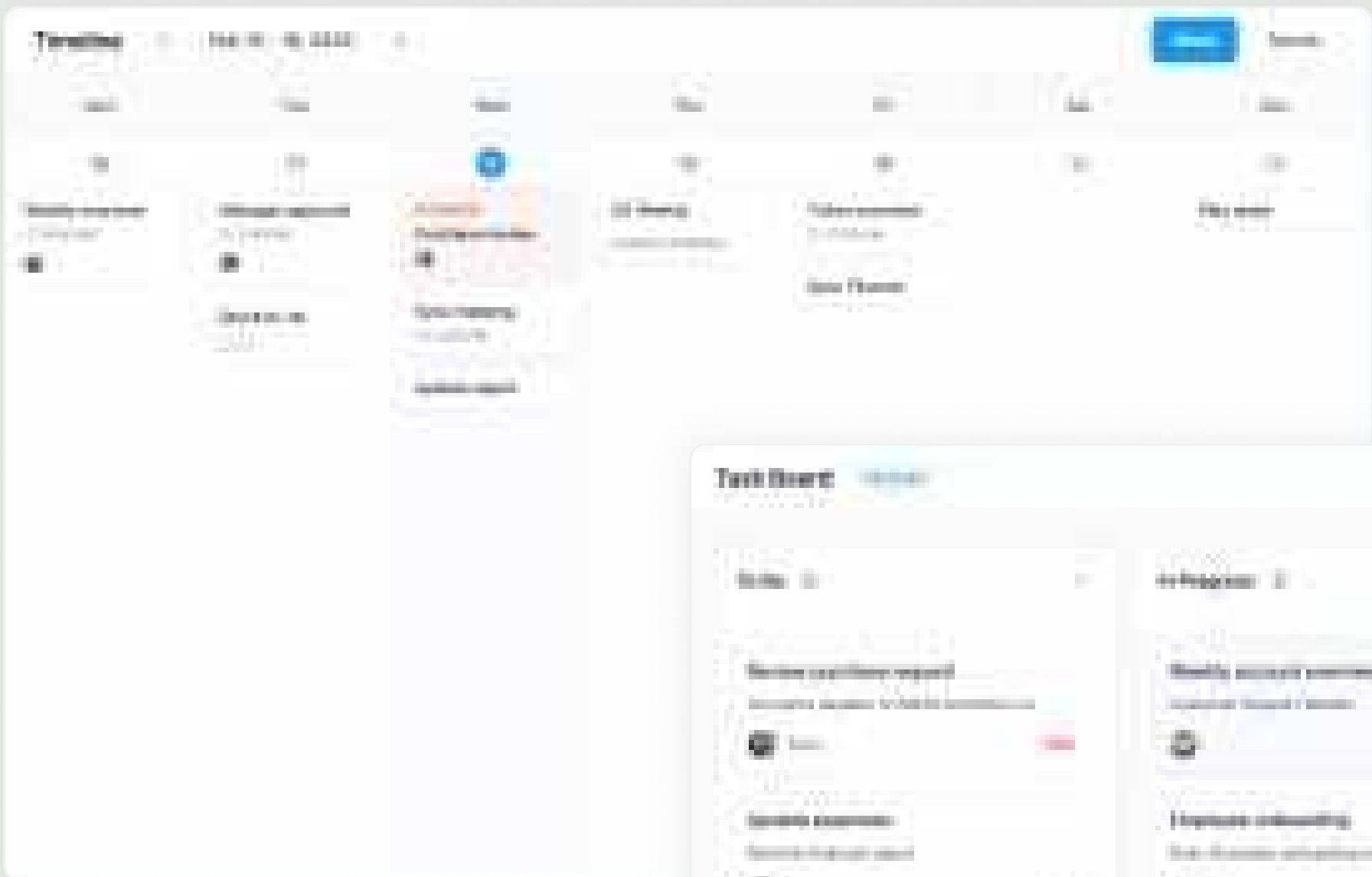
Process

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.

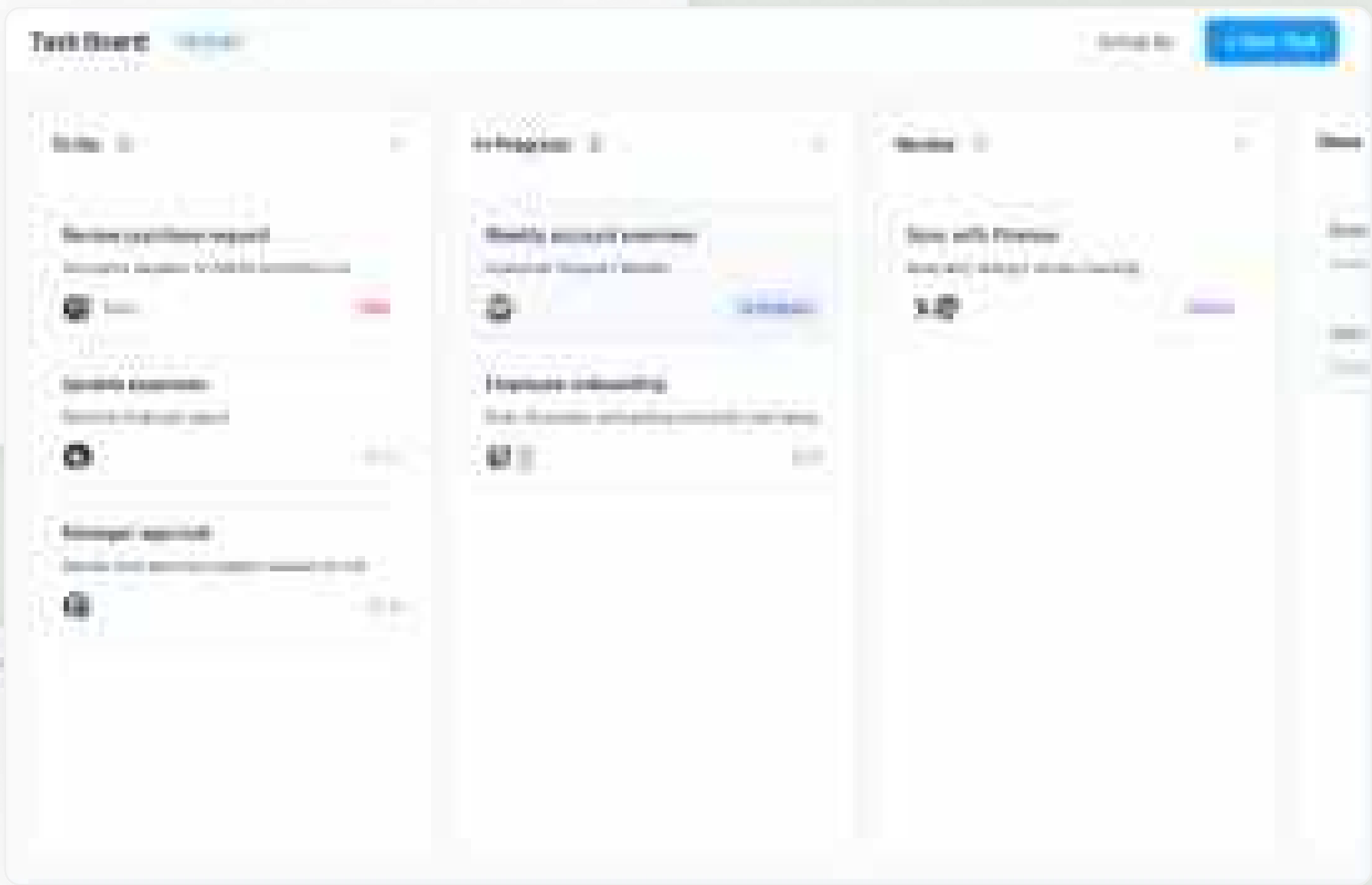


We chose a condensed list view based on feedback because it enables faster scanning and prioritization across many tasks, without the overhead of Kanban or calendar views.

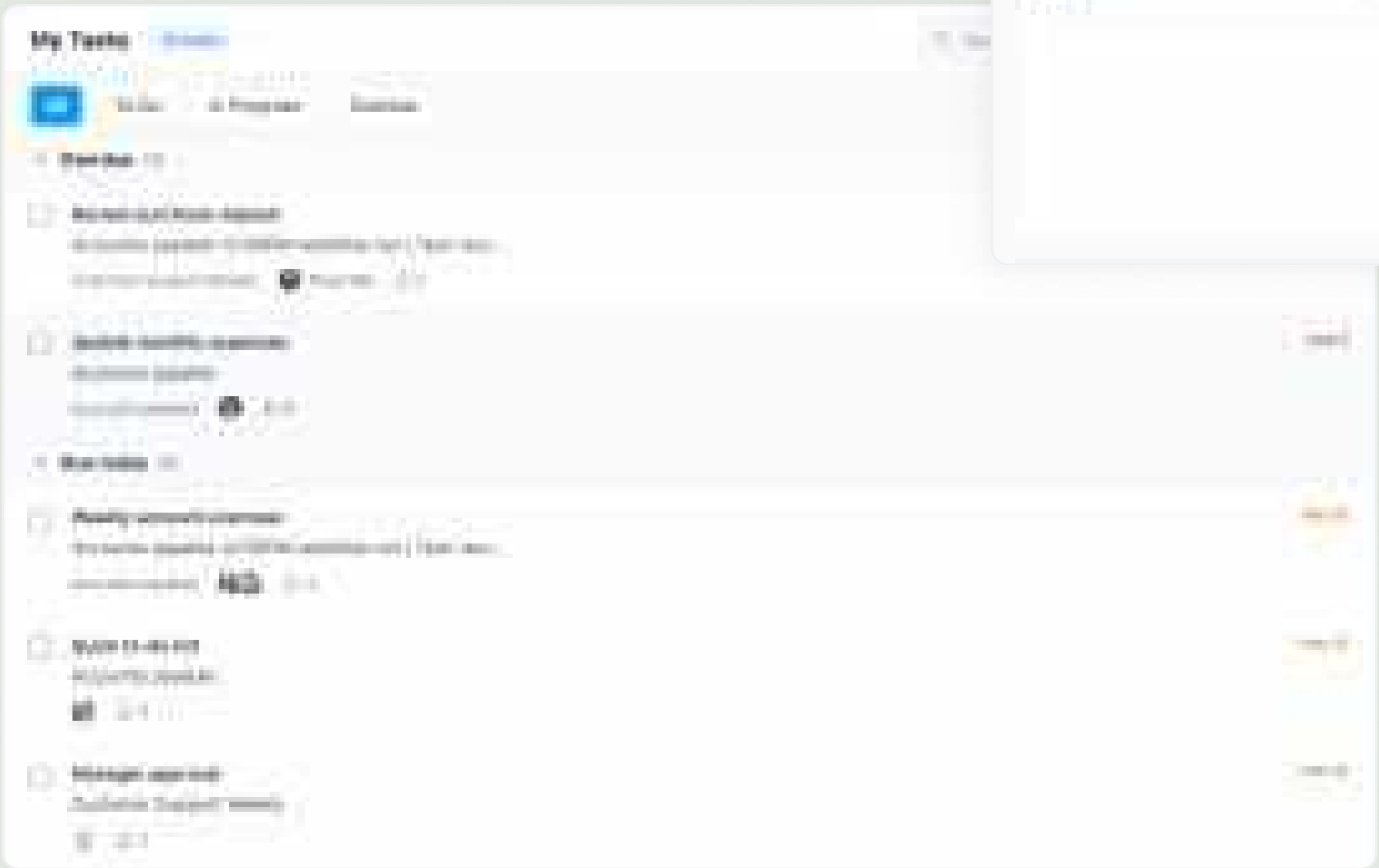
Future iterations planned to add AI-prioritized calendar and Kanban views.



Calendar view



Kanban view



List view #02

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.

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 • indianacaba.me