Indiana Caba

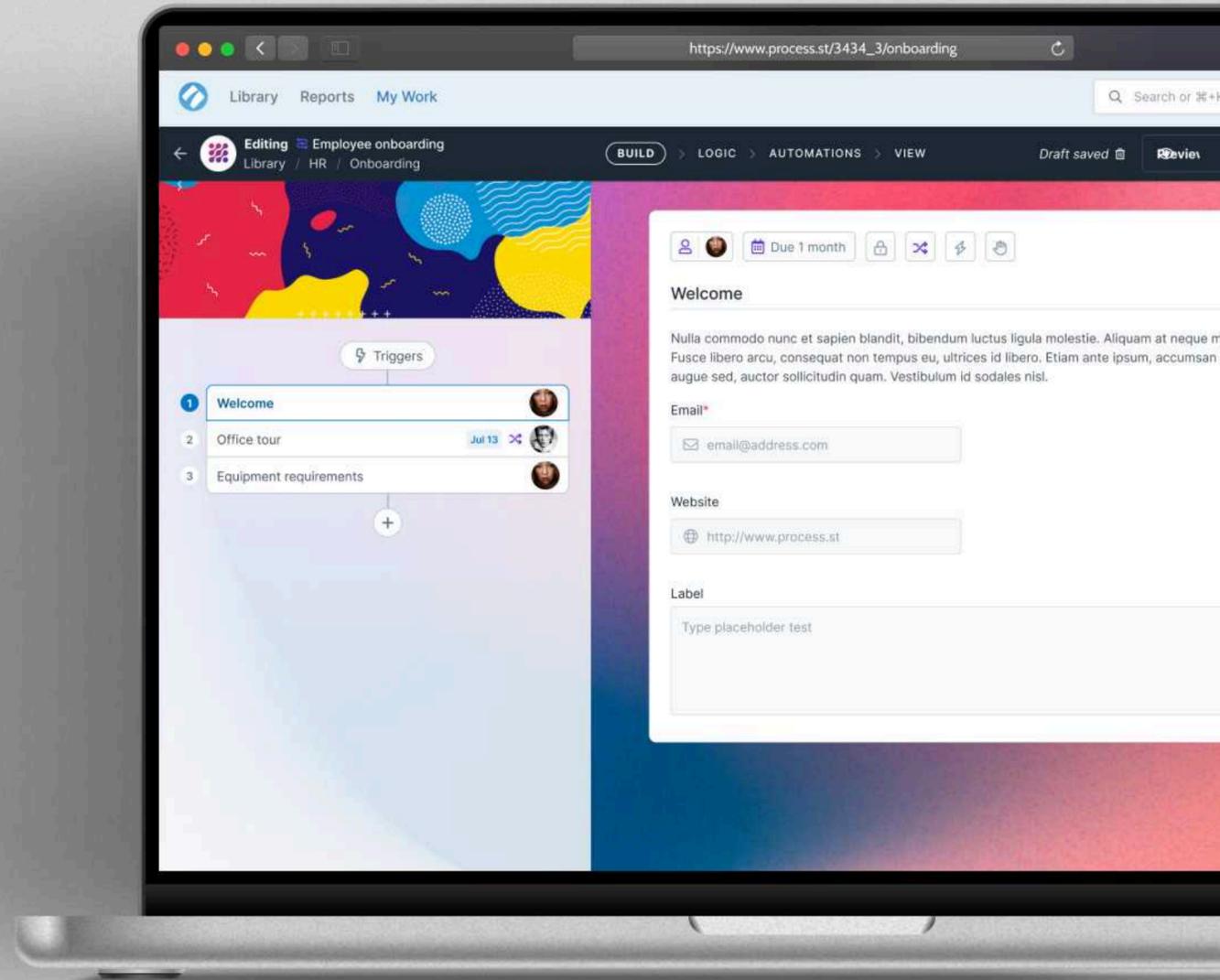## *Designing for Clarity & Scale*

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

Recent experience and education

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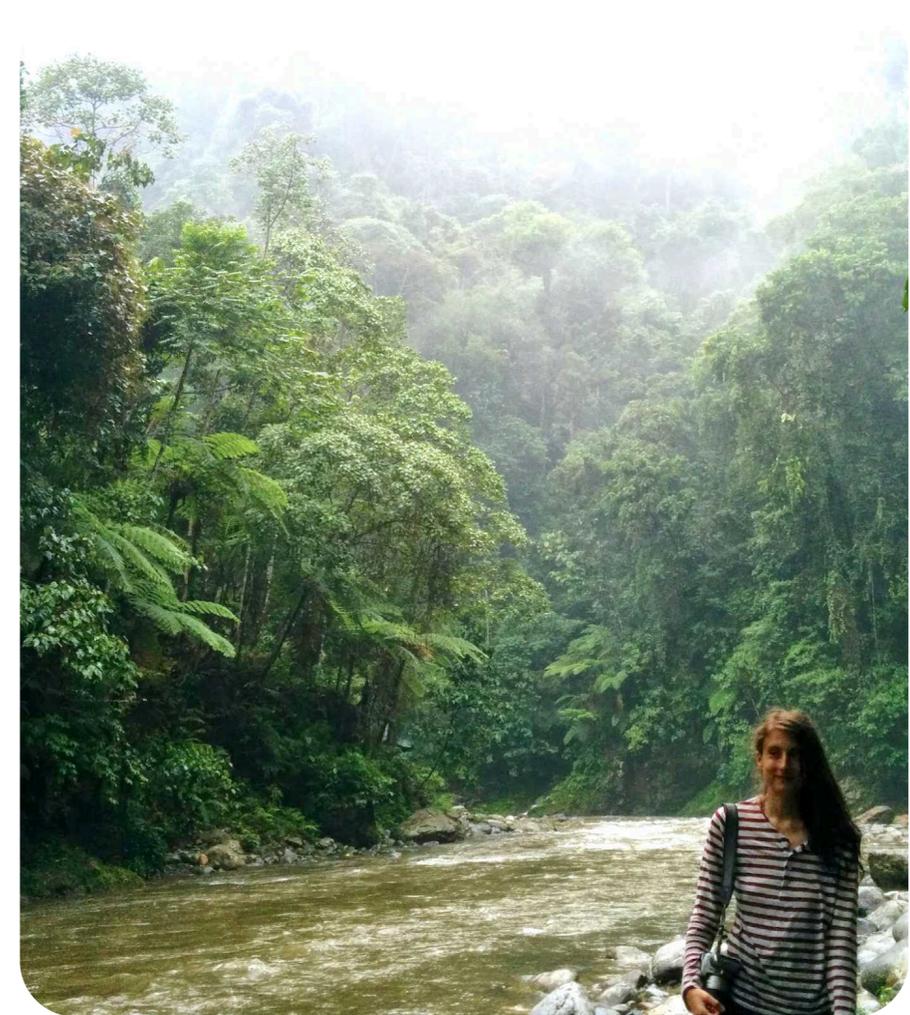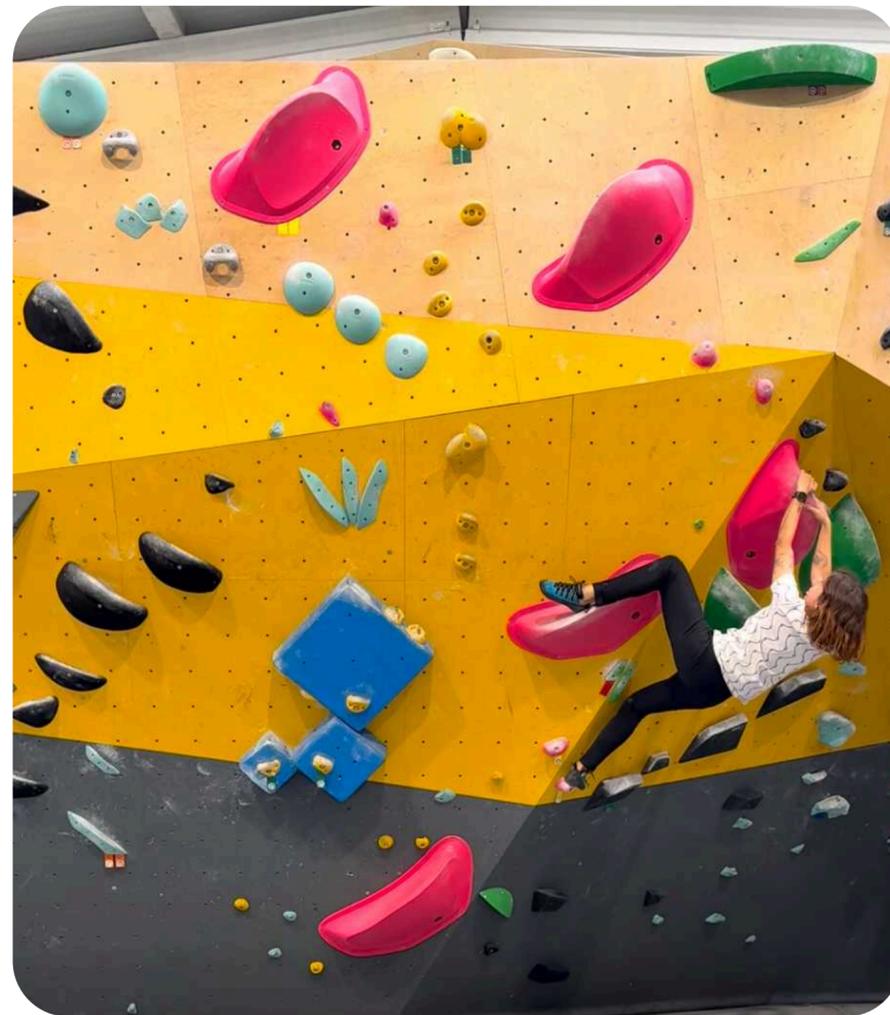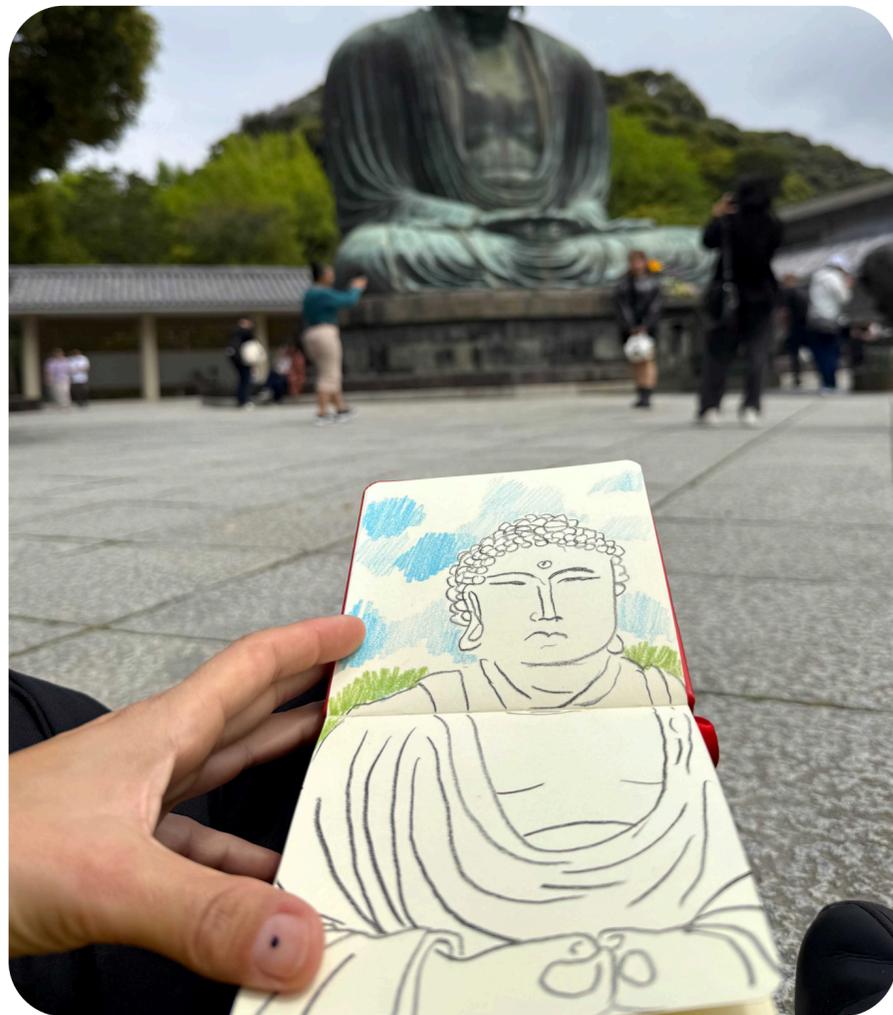2021–2025

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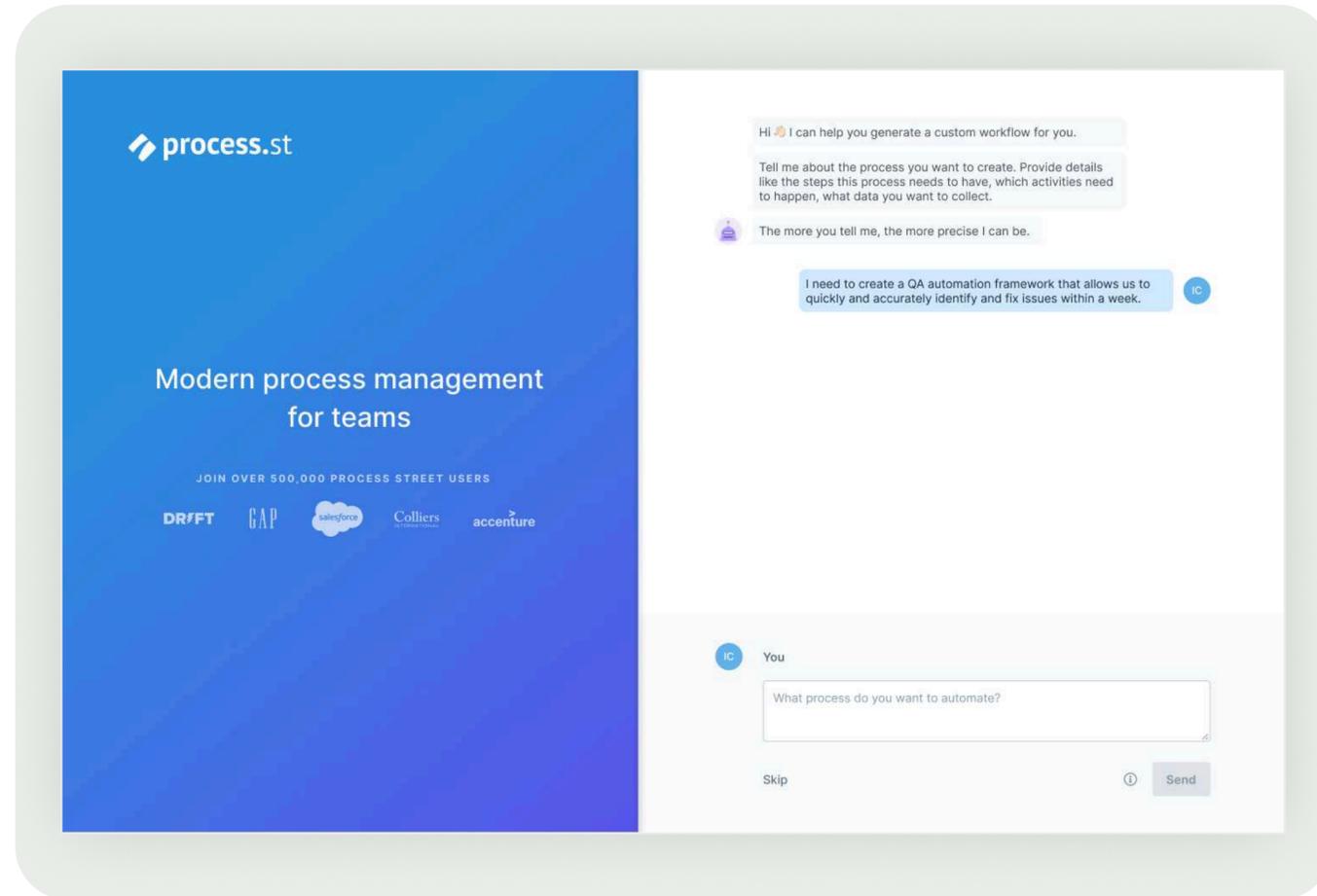2017–2019

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

Communication & Media Studies
BA & MA, Complutense University
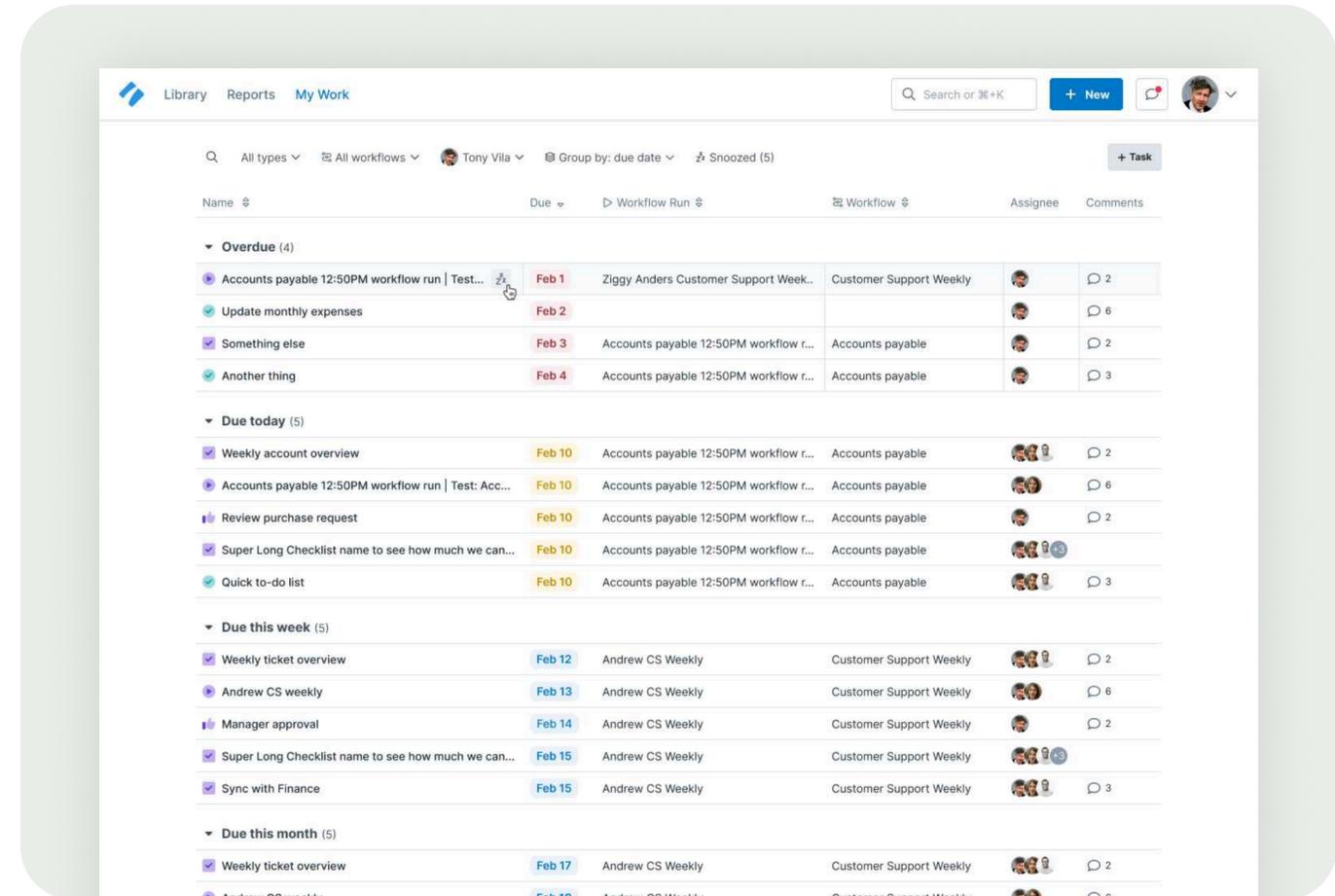2005–20150

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

Selected projects

AI-Powered Workflows

Process Street, 2025

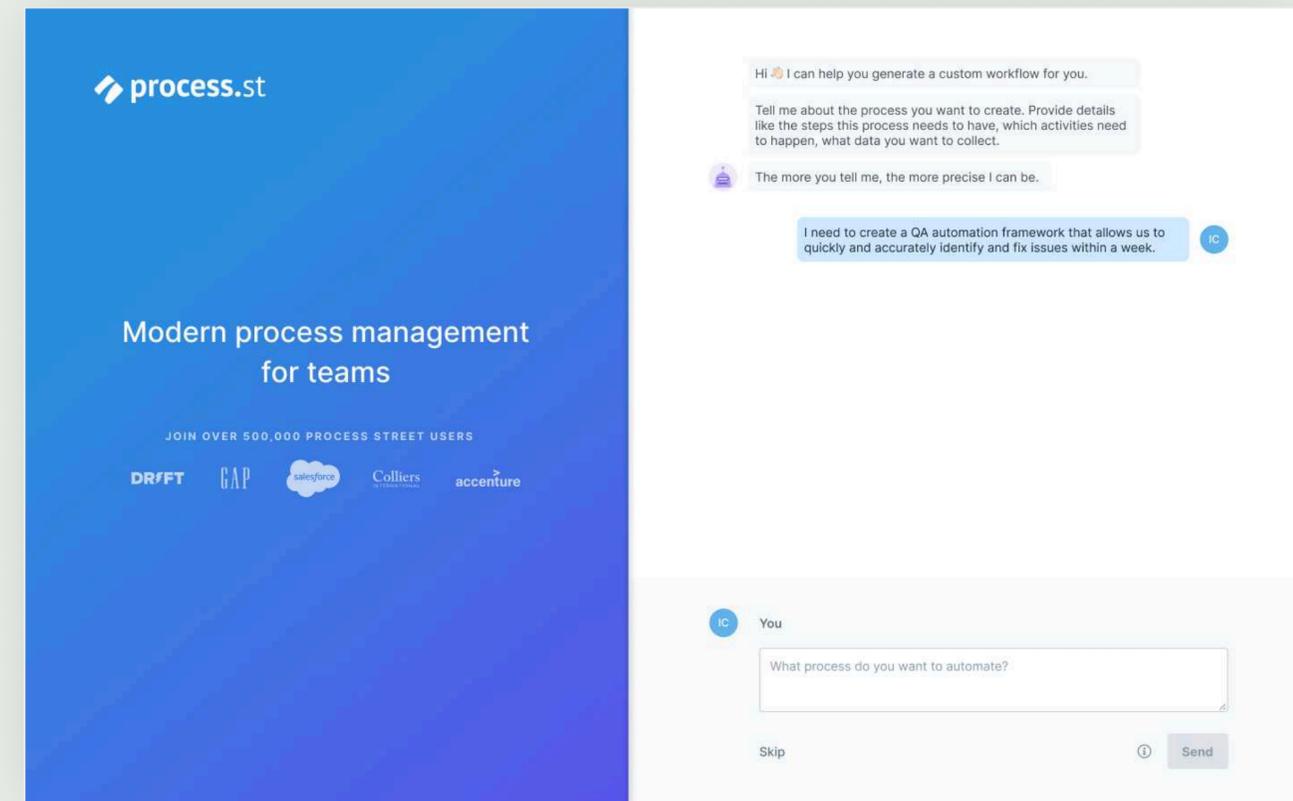
Inbox, Made Clear

Process Street, 2024

AI-Powered Workflows

process.st

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

process.st

Modern process management for teams

JOIN OVER 500,000 PROCESS STREET USERS

DRIFT   GAP   salesforce   Colliers   accenture

Hi 👋 I can help you generate a custom workflow for you.

Tell me about the process you want to create. Provide details like the steps this process needs to have, which activities need to happen, what data you want to collect.

The more you tell me, the more precise I can be.

I need to create a QA automation framework that allows us to quickly and accurately identify and fix issues within a week.

IC   You

What process do you want to automate?

Skip   Send

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

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.

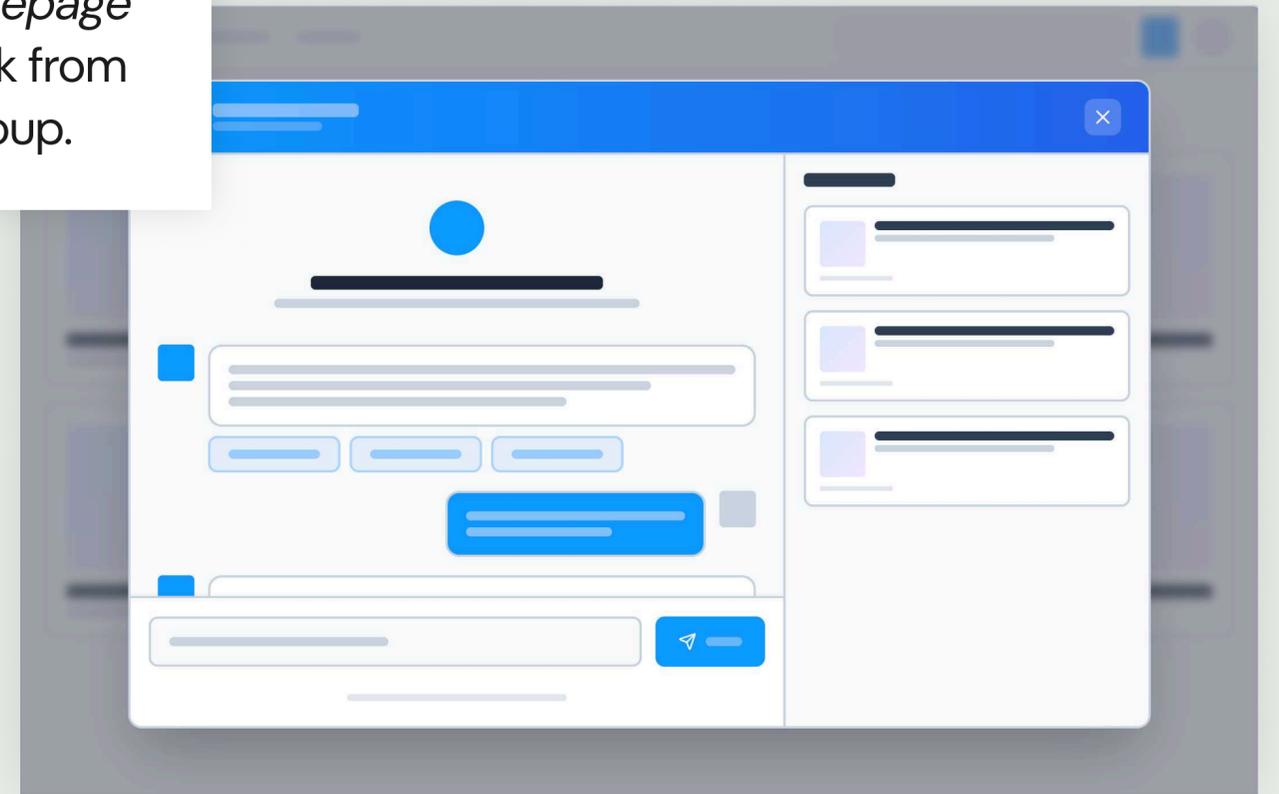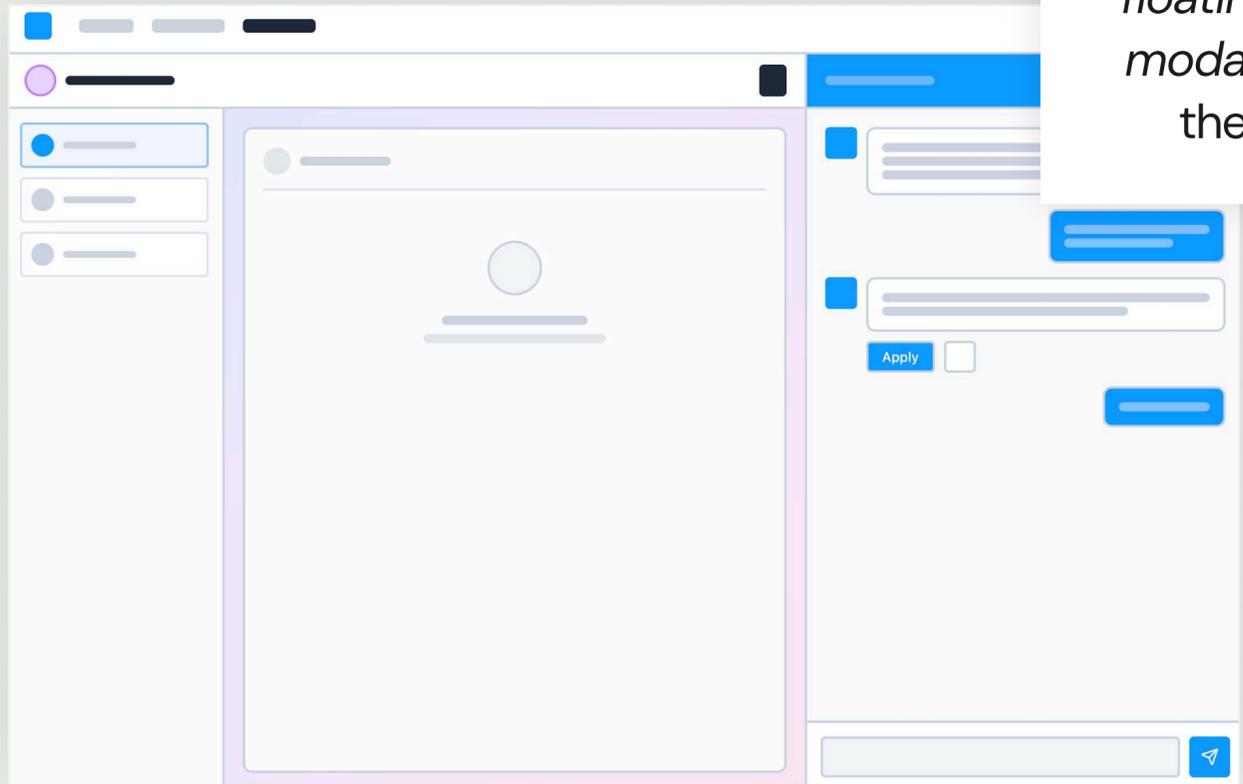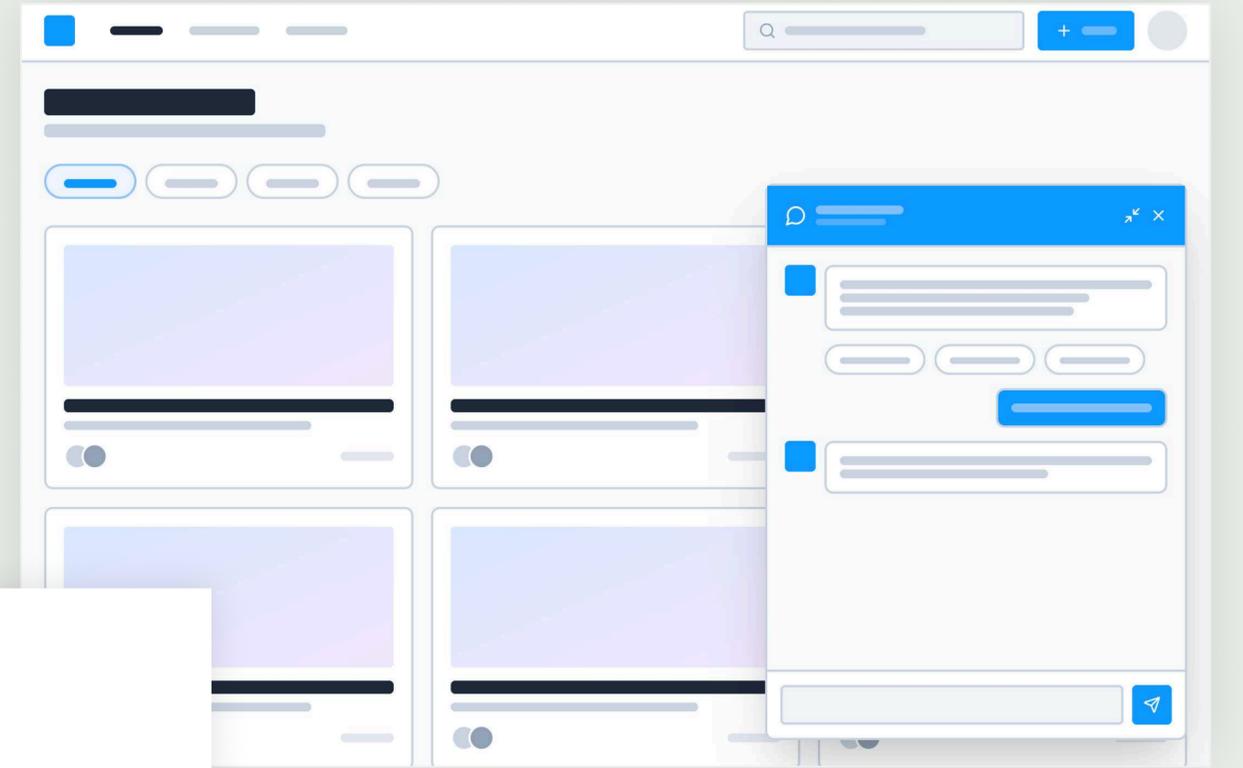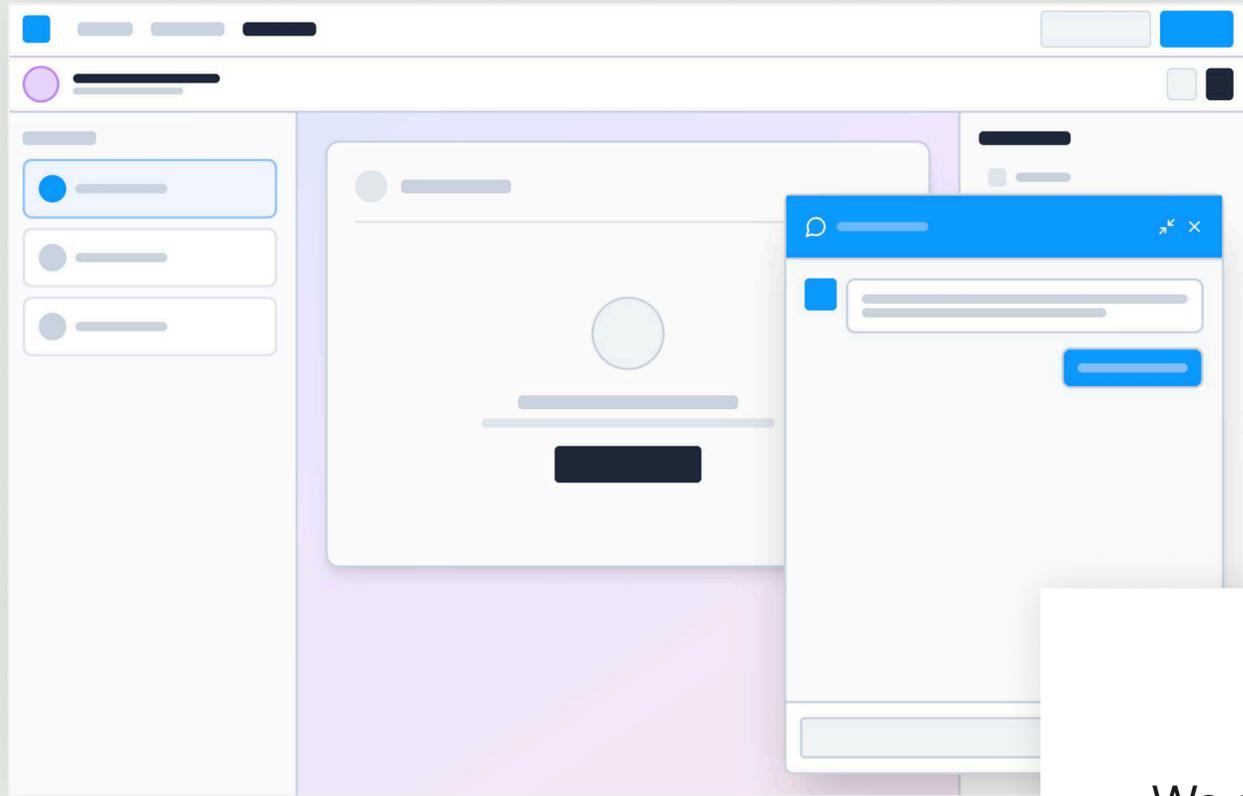→ Following this work, we launched an **AI task generator** with a built-in sandbox.

Impact

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

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.

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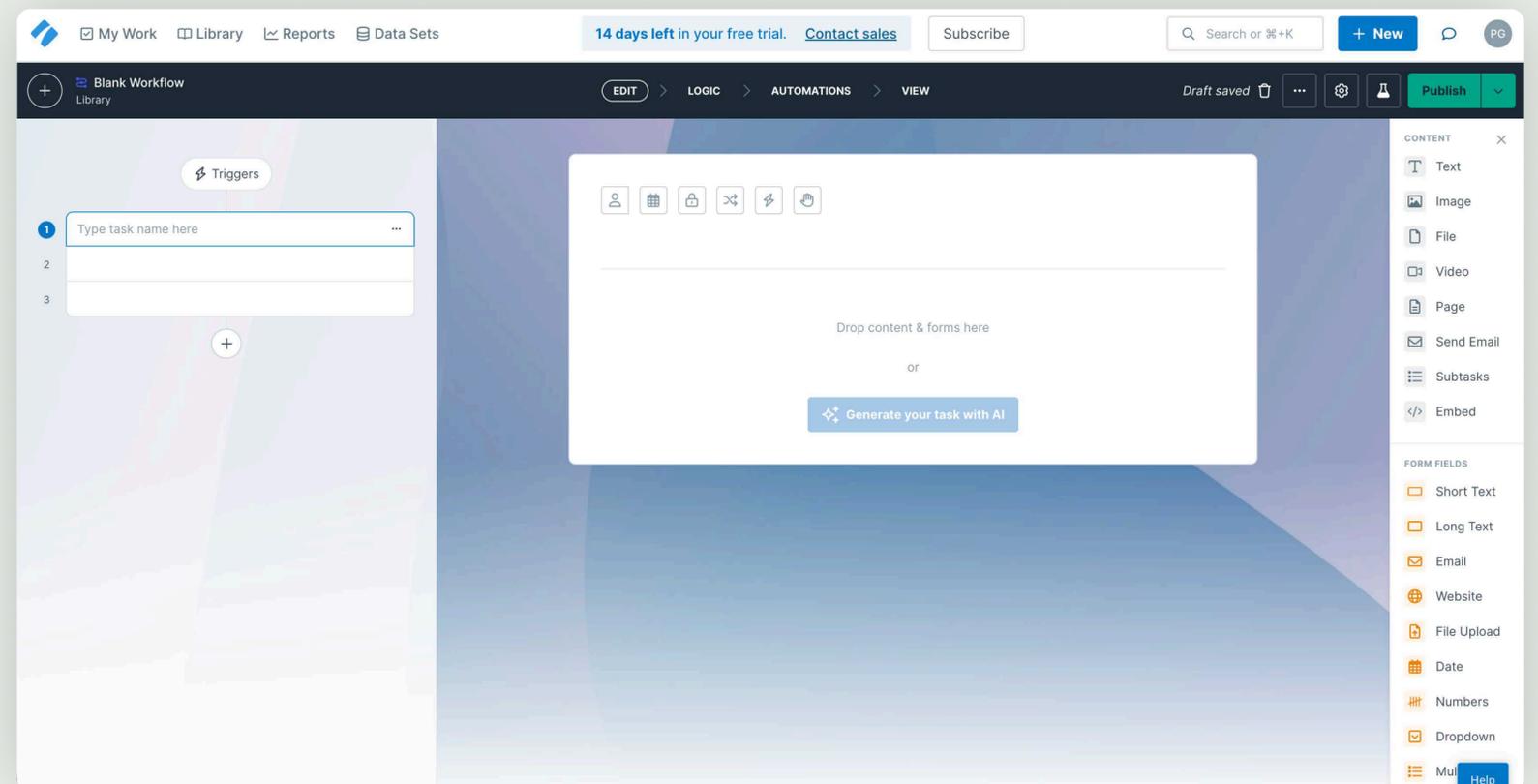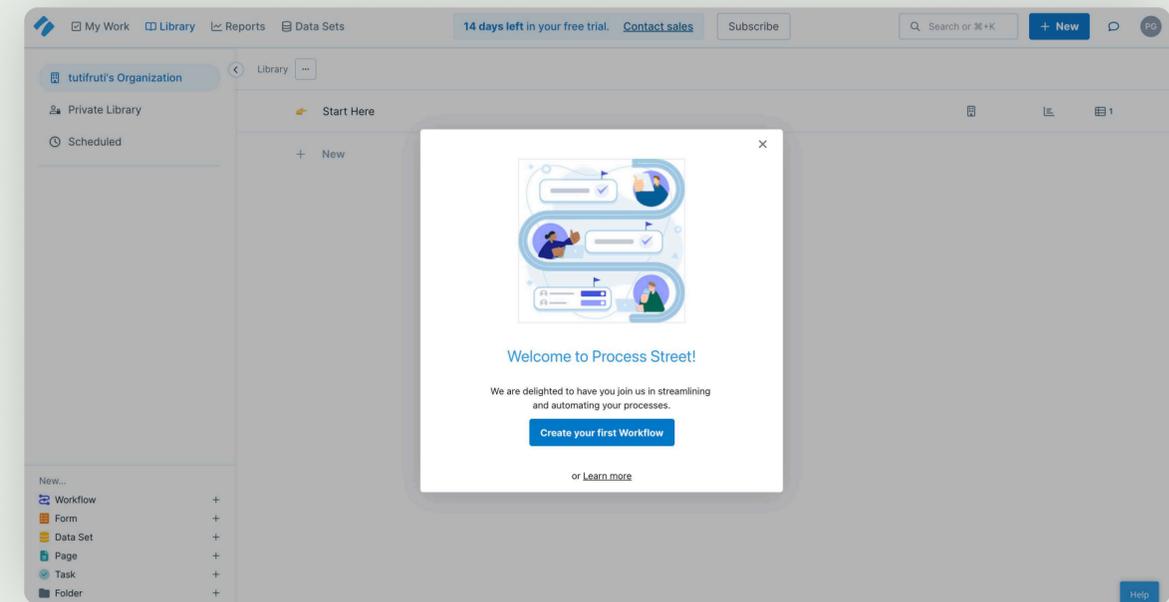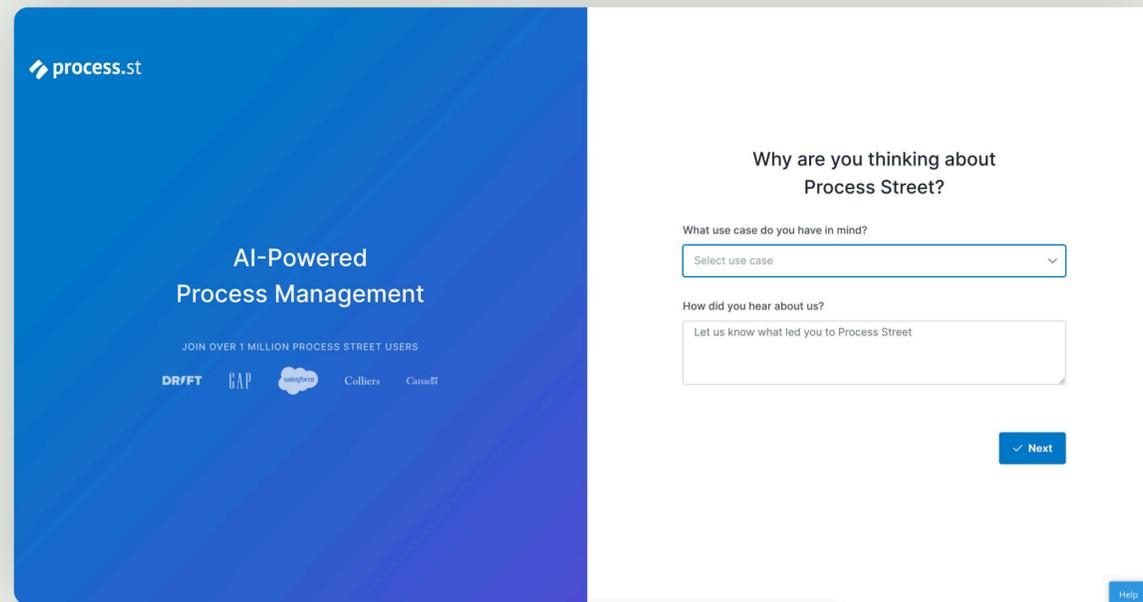
No guidance or 'aha' moment.
Users didn't know where to
start or how to apply the
product to their problem.

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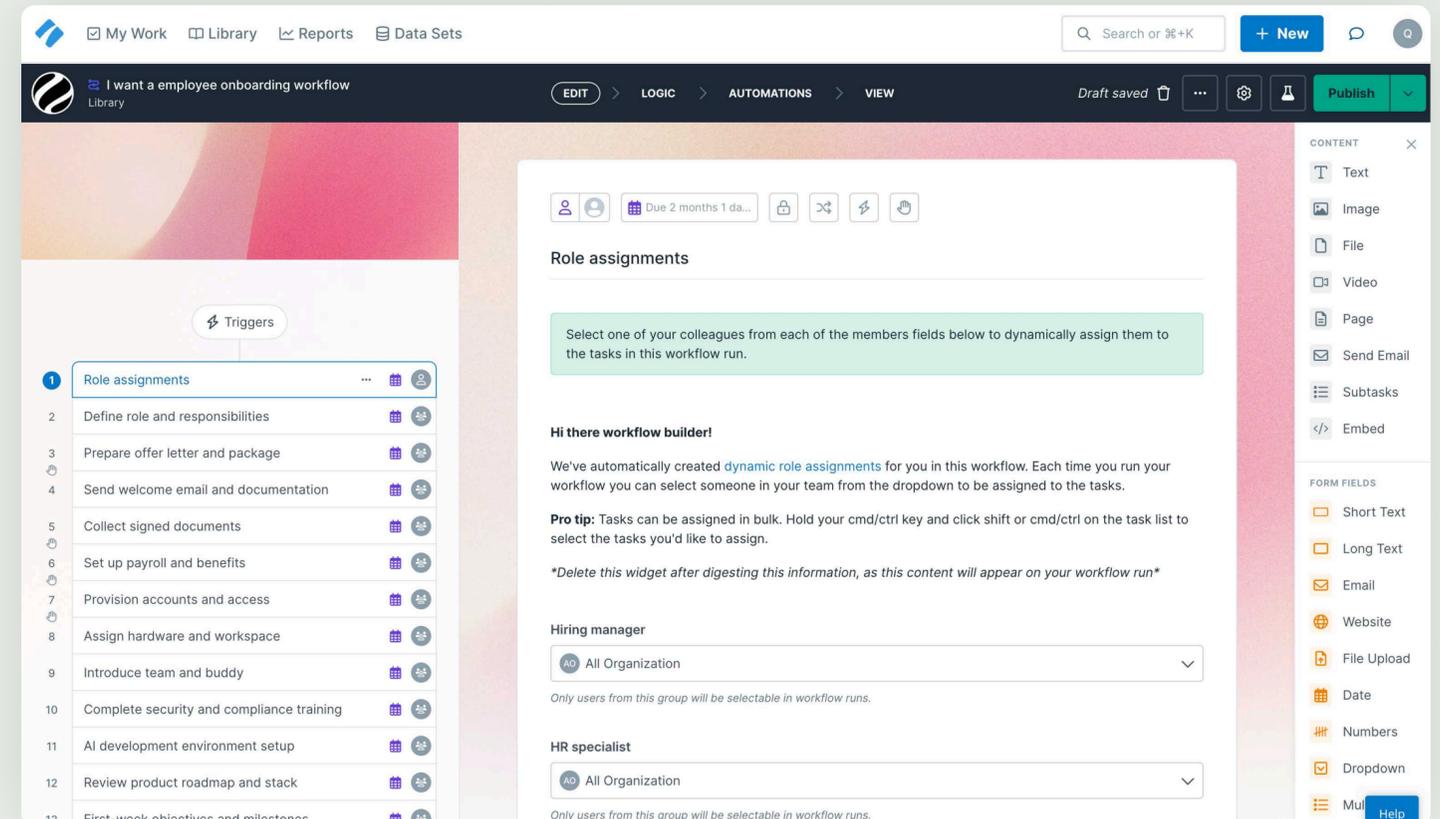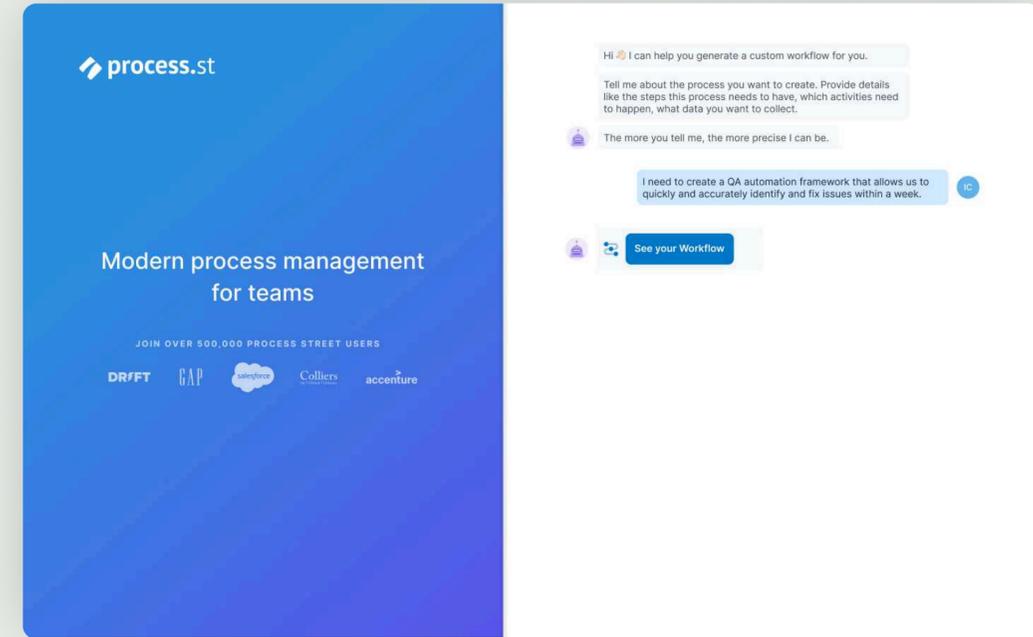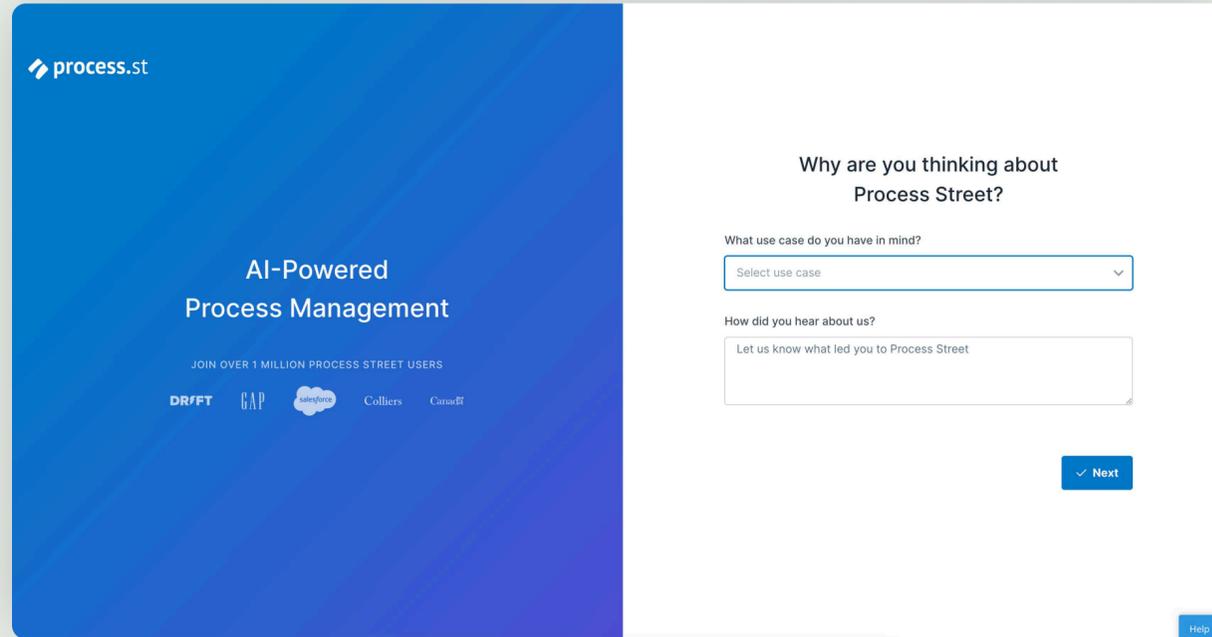
After the standard onboarding flow, users landed directly in an AI–generated workflow tailored to their problem, company, and industry. We also added a step–by–step guide to walk them through setup.

Try the <u>interactive protoype</u>

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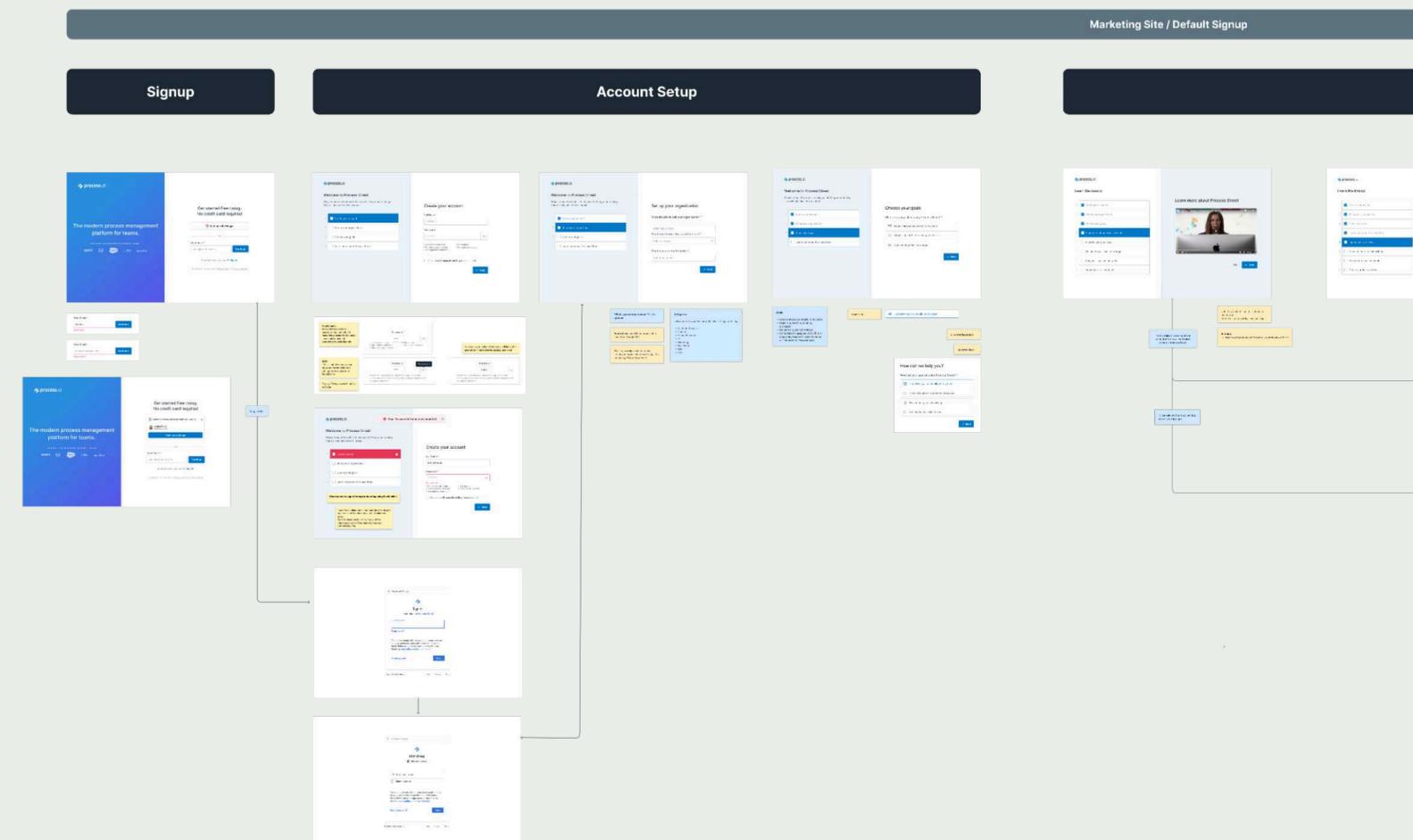
We explored multiple AI
onboarding concepts with different
cost trade-offs, testing them
internally and with power users.

Smart Template Finder
AI-powered template recommendations

Search workflows or describe your needs...

Select your department

Sales

HR

Support

Finance

Operations

Product

Smart templates

Guided Workflow Builder
AI-assisted step-by-step creation

Workflow

Team

Automations

Notifications

Workflow Basics
Step 1 of 4

Workflow Name

e.g., Employee Onboarding Process

Description

What does this workflow accomplish?

Primary Goal

e.g., Streamline new hire paperwork

< Back

Guided builder

Process Mining Onboarding
AI discovers workflows from your data

Upload Your Data

Upload existing process data and let AI automatically map your workflows

Drop files here or click to upload
CSV, Excel, or JSON files

Supported Data Sources:

Email Logs

Task Data

CRM Exports

Help Desk Tickets

Calendar Events

Project Tools

Process mining

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

process.st

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

Library   Reports   My Work

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

Name ⇕   Workflow ⇕

DUE DATE ✕

Date   Time
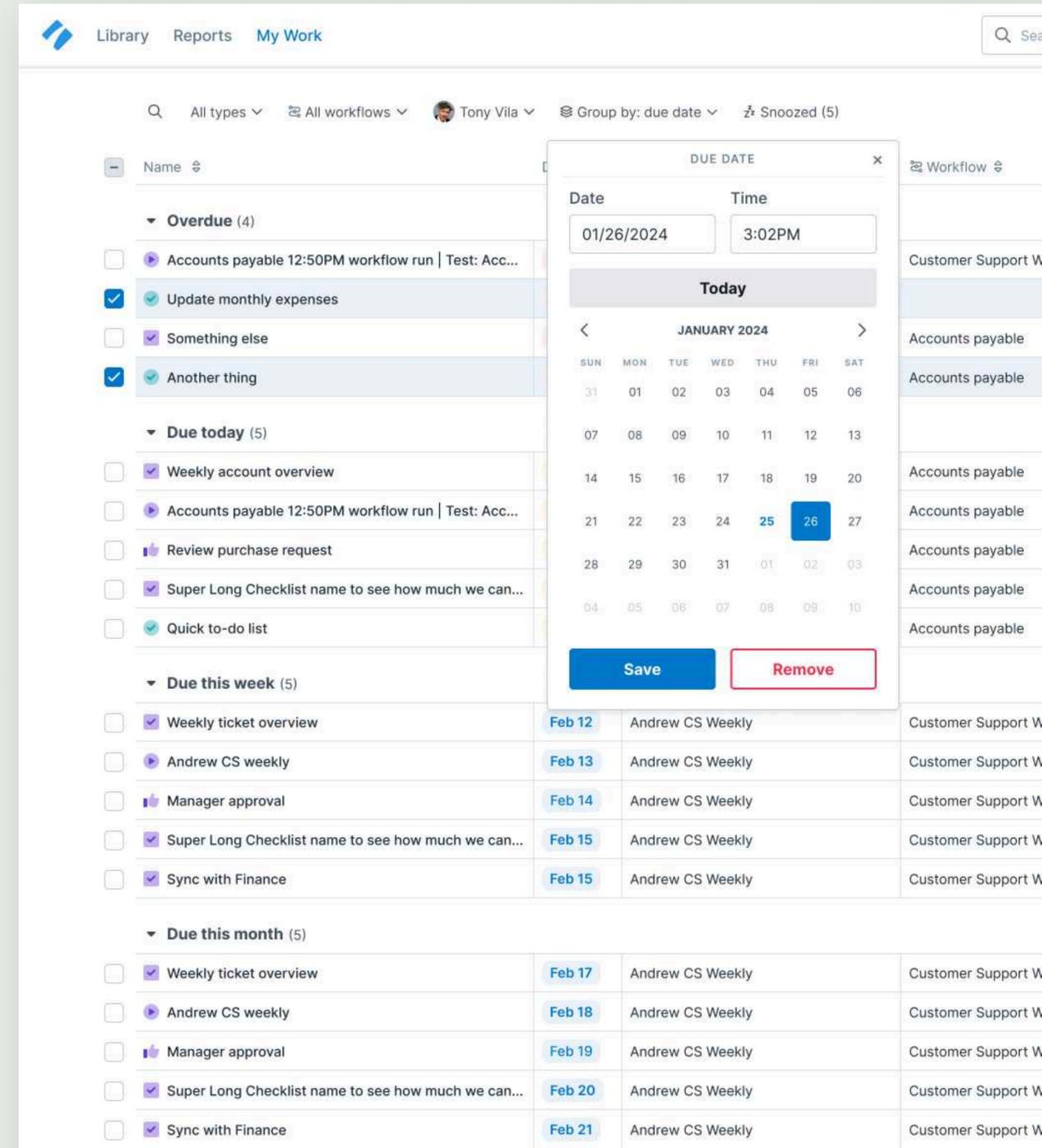01/26/2024   3:02PM

Today

‹   JANUARY 2024   ›

SUN MON TUE WED THU FRI SAT
31   01   02   03   04   05   06
07   08   09   10   11   12   13
14   15   16   17   18   19   20
21   22   23   24   25   26   27
28   29   30   31   01   02   03
04   05   06   07   08   09   10

Save   Remove

▾ Overdue (4)

☐ ▶ Accounts payable 12:50PM workflow run | Test: Acc...   Customer Support W
☑ ✔ Update monthly expenses
☐ ✔ Something else   Accounts payable
☑ ✔ Another thing   Accounts payable

▾ Due today (5)

☐ ✔ Weekly account overview   Accounts payable
☐ ▶ Accounts payable 12:50PM workflow run | Test: Acc...   Accounts payable
☐ 👍 Review purchase request   Accounts payable
☐ ✔ Super Long Checklist name to see how much we can...   Accounts payable
☐ ✔ Quick to-do list   Accounts payable

▾ Due this week (5)

☐ ✔ Weekly ticket overview   Feb 12   Andrew CS Weekly   Customer Support W
☐ ▶ Andrew CS weekly   Feb 13   Andrew CS Weekly   Customer Support W
☐ 👍 Manager approval   Feb 14   Andrew CS Weekly   Customer Support W
☐ ✔ Super Long Checklist name to see how much we can... Feb 15   Andrew CS Weekly   Customer Support W
☐ ✔ Sync with Finance   Feb 15   Andrew CS Weekly   Customer Support W

▾ Due this month (5)

☐ ✔ Weekly ticket overview   Feb 17   Andrew CS Weekly   Customer Support W
☐ ▶ Andrew CS weekly   Feb 18   Andrew CS Weekly   Customer Support W
☐ 👍 Manager approval   Feb 19   Andrew CS Weekly   Customer Support W
☐ ✔ Super Long Checklist name to see how much we can... Feb 20   Andrew CS Weekly   Customer Support W
☐ ✔ Sync with Finance   Feb 21   Andrew CS Weekly   Customer Support W

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.
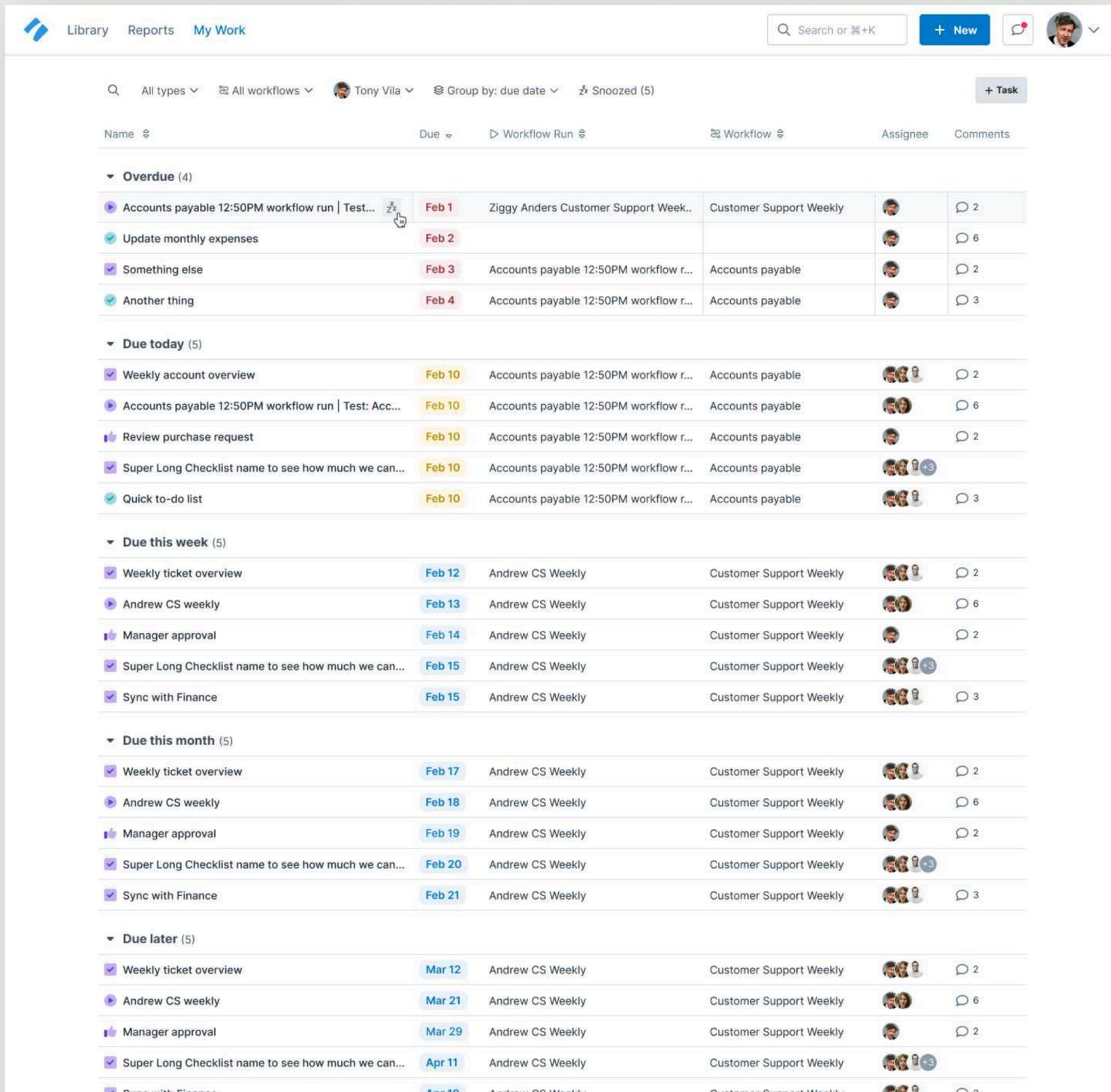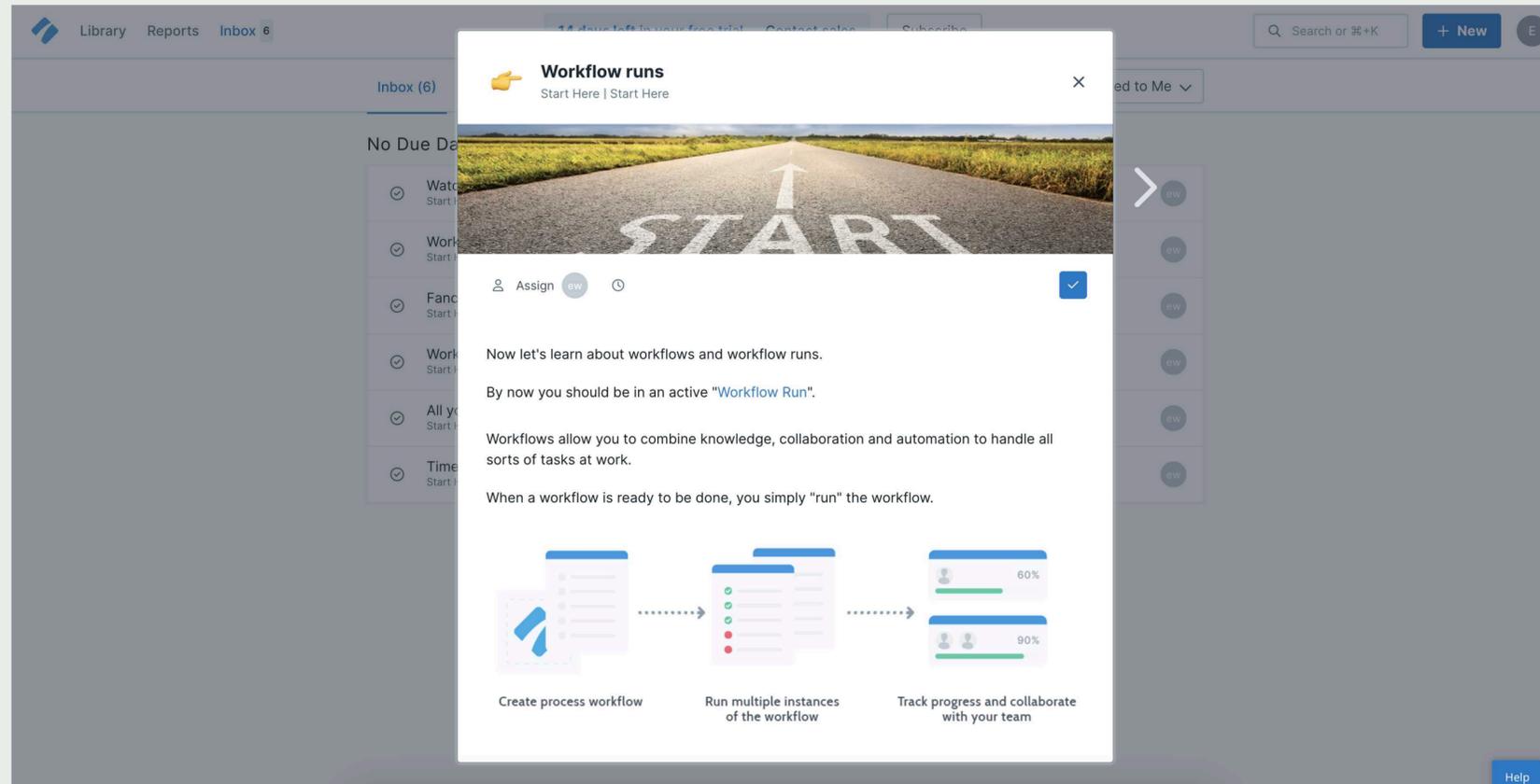
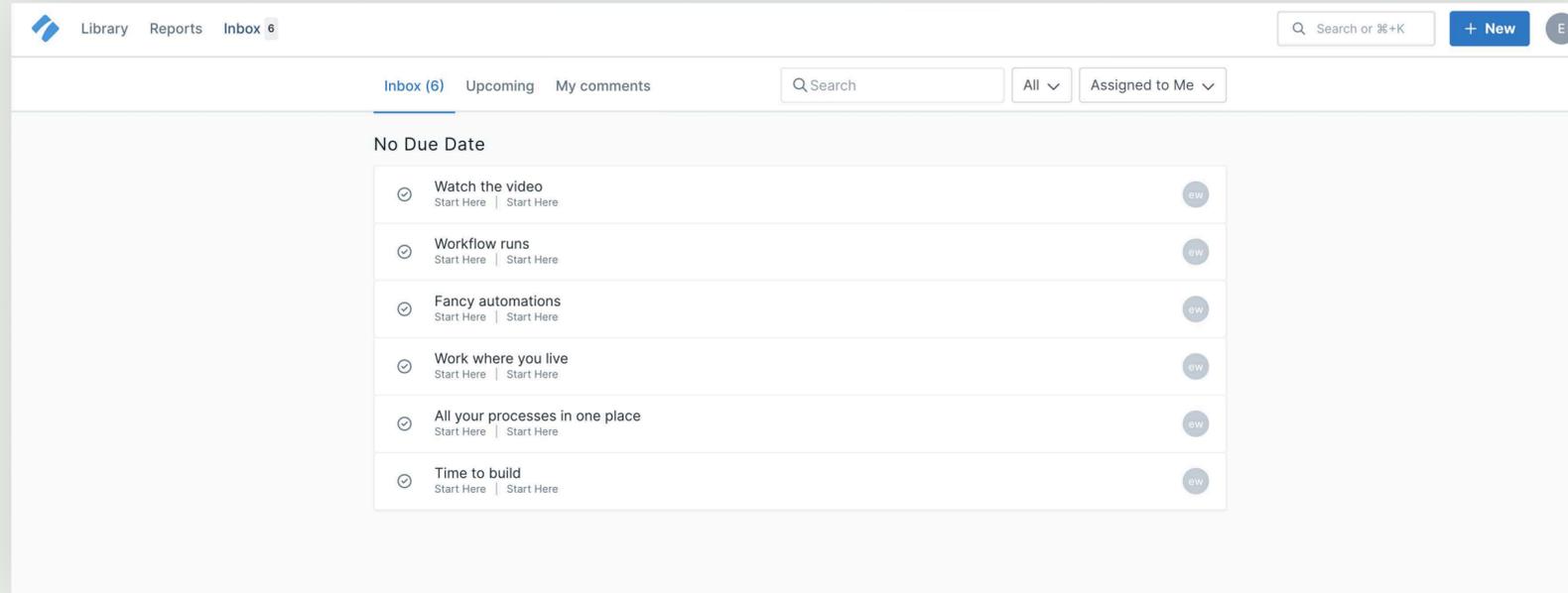## Description

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

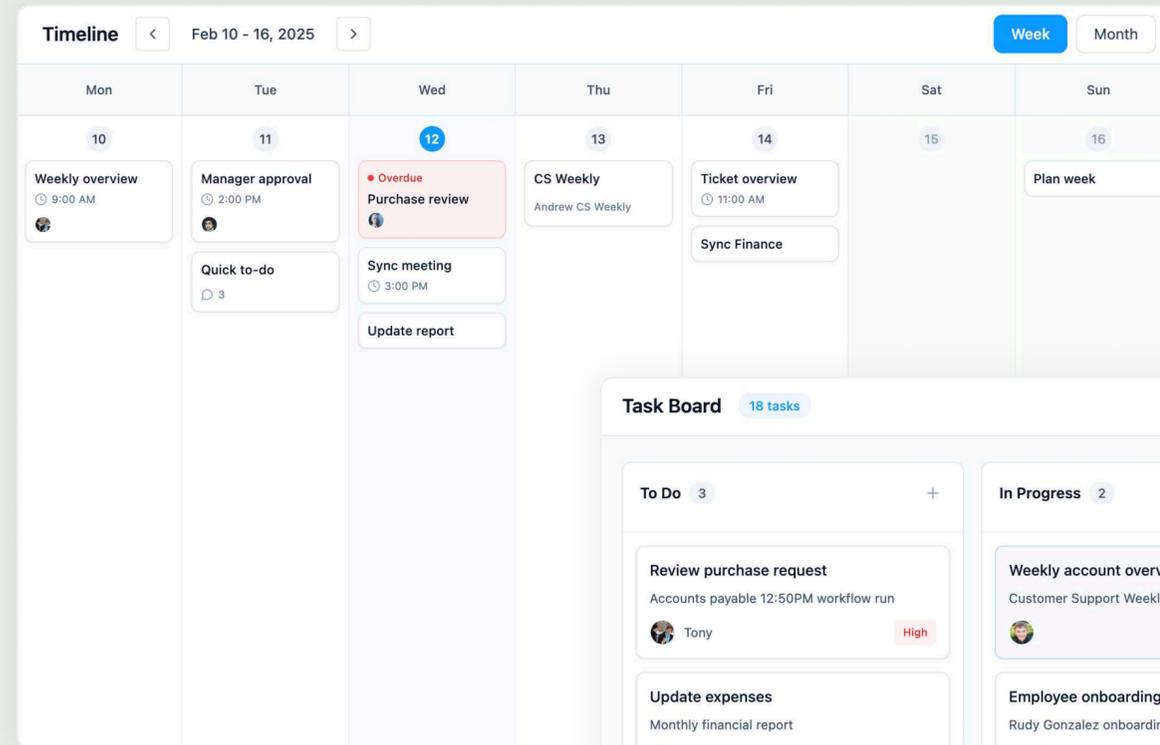# Process

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.

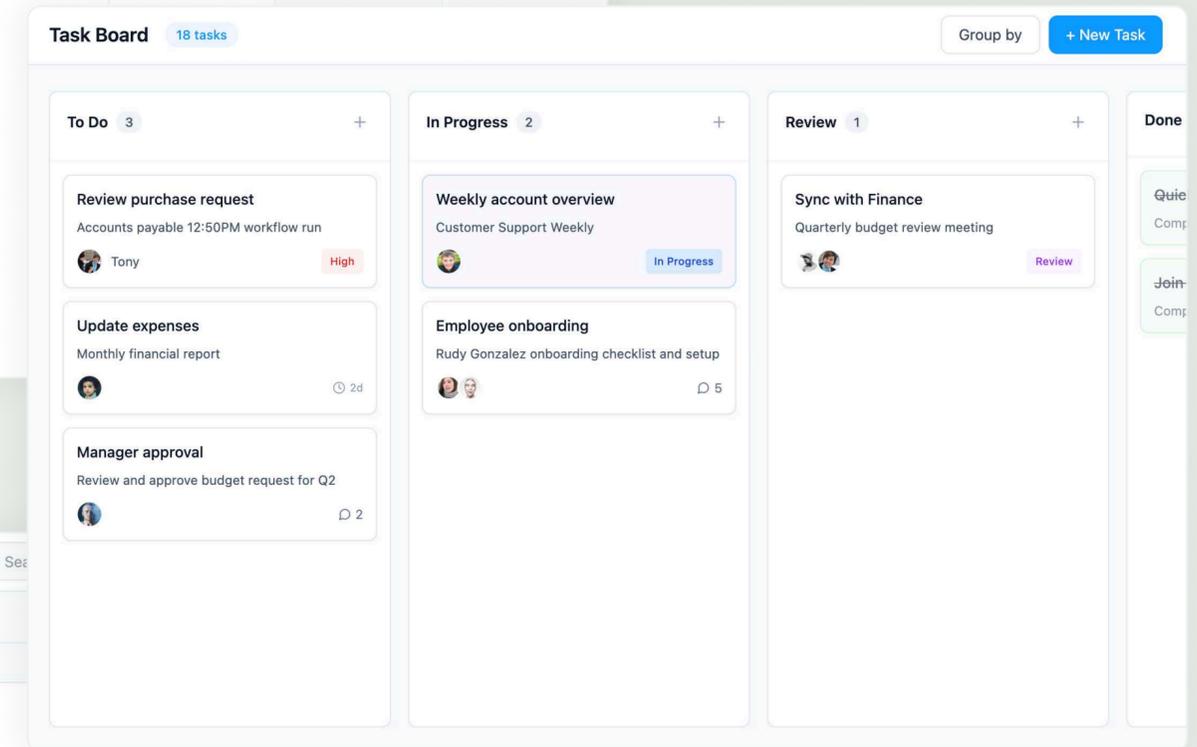5. Evaluated outcomes and iterated based on impact.
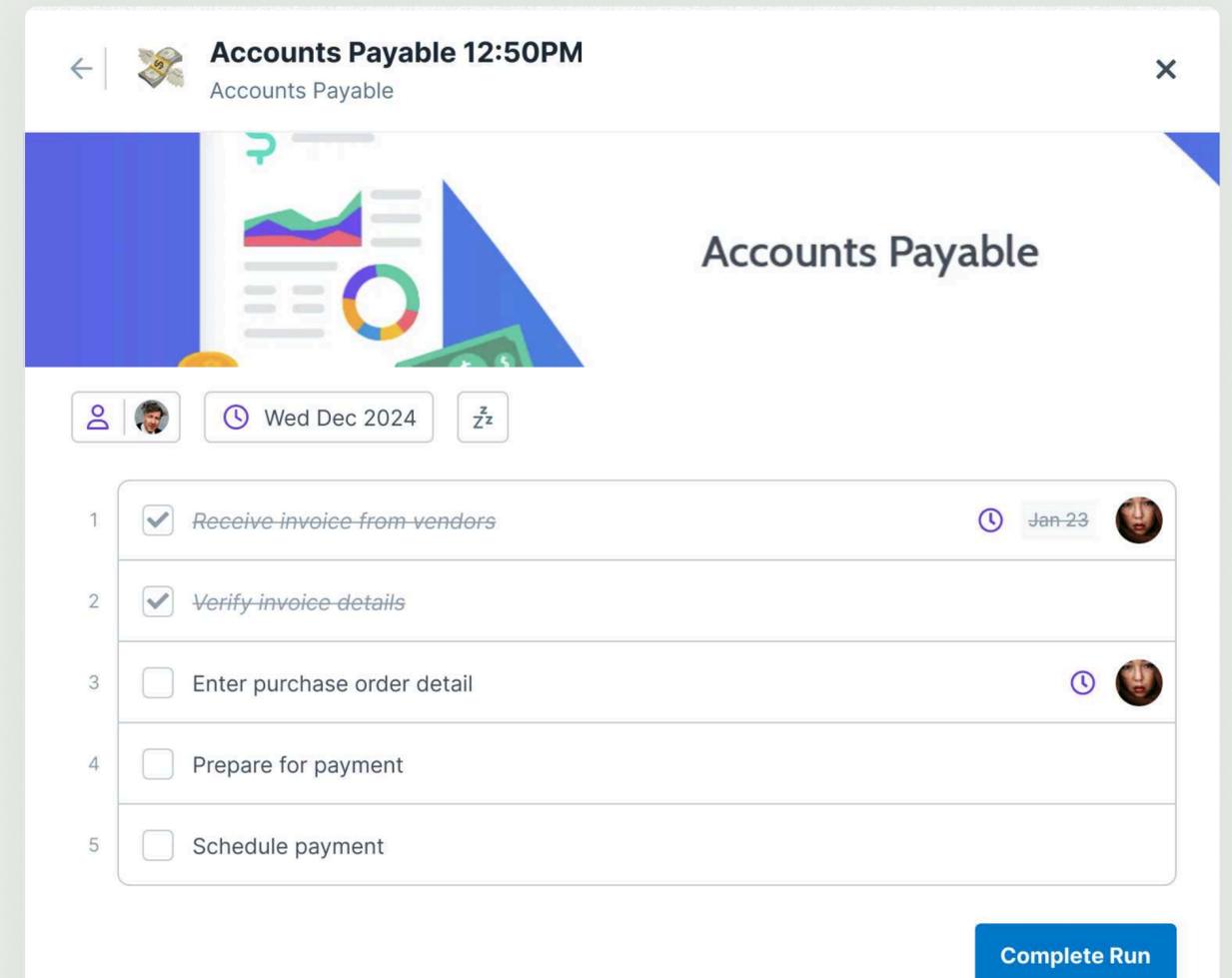
We chose a condensed list view based on feedback because it enables faster scanning and prioritization across many tasks, without the overhead of Kanban or calendar views.

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

Timeline ‹ Feb 10 - 16, 2025 › | Week | Month

Mon	Tue	Wed	Thu	Fri	Sat	Sun
10	11	12	13	14	15	16

Weekly overview
9:00 AM

Manager approval
2:00 PM

● Overdue
Purchase review

CS Weekly
Andrew CS Weekly

Ticket overview
11:00 AM

Plan week

Quick to-do
💬 3

Sync meeting
3:00 PM

Sync Finance

Update report

Calendar view

Task Board 18 tasks   Group by   + New Task

To Do 3   +

In Progress 2   +

Review 1   +

Done

Review purchase request
Accounts payable 12:50PM workflow run
Tony   High

Weekly account overview
Customer Support Weekly
                          In Progress

Sync with Finance
Quarterly budget review meeting
                          Review

Quie
Comp

Update expenses
Monthly financial report
                    🕐 2d

Employee onboarding
Rudy Gonzalez onboarding checklist and setup
                    💬 5

Join
Comp

Manager approval
Review and approve budget request for Q2
                    💬 2

My Tasks 18 tasks   🔍 Sea

All | To Do | In Progress | Overdue

⌄ **Overdue** (3)

☐ Review purchase request
Accounts payable 12:50PM workflow run | Test: Acc...
Customer Support Weekly Tony Vila 💬 2

☐ Update monthly expenses   Feb 2
Accounts payable
Accounts payable 💬 6

⌄ **Due today** (5)

☐ Weekly account overview   Feb 10
Accounts payable 12:50PM workflow run | Test: Acc...
Accounts payable 💬 2

☐ Quick to-do list   Feb 10
Accounts payable
💬 3

☐ Manager approval   Feb 10
Customer Support Weekly
💬 2

Kanban view

List view #02

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!

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