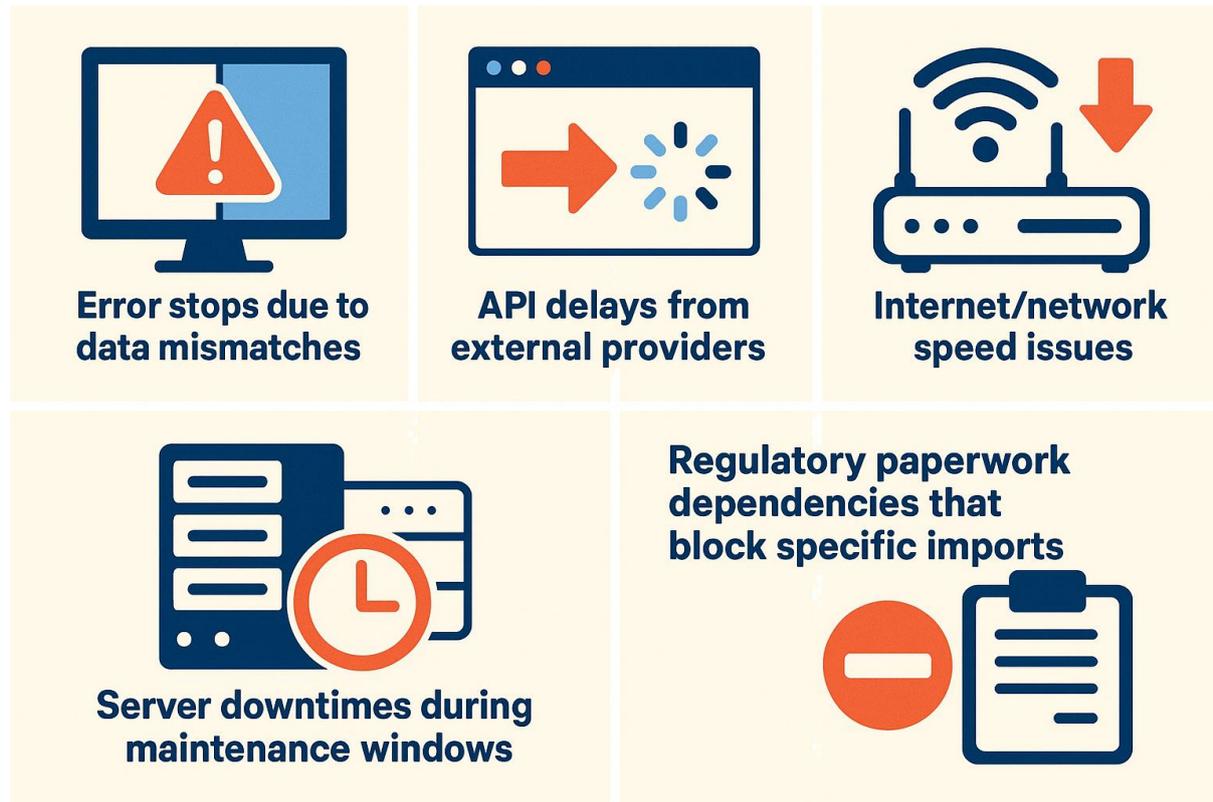


Case Study: Designing a Resilient Bulk Data Import Experience for a FinTech Platform

1. Problem Statement

Institutional clients rely on nightly imports of **large financial datasets** (Accounts, Families, CUSIPs, and Comments). These jobs often face:



These failures create **anxiety, delays, and operational inefficiency**. Users have limited visibility into where errors occur and lack the ability to control or resume processes.

2. Research & Insights

User Pain Points

Transparency Gap



Users don't know where or why imports fail.

Control Gap



Re-running full jobs after small errors wastes time

Predictability Gap



Timelines shift unpredictably with poor network conditions

Trust Gap



Compliance-related holds show cryptic codes instead of actionable steps

Collaboration Gap

Ops, Compliance, and IT teams struggle with fragmented communication



Business Constraints

Imports must complete before market open



audit logs for every action.

System downtime

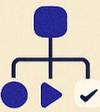


is unavoidable but must be communicated gracefully.

3. Design Approach (UX Lead Perspective)

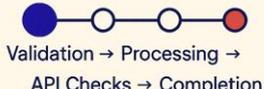
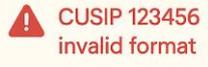
As **Anjithpal (UX Lead)**, I adopted a **service design mindset** — balancing user empathy, technical feasibility, and compliance requirements.

Core UX Goals

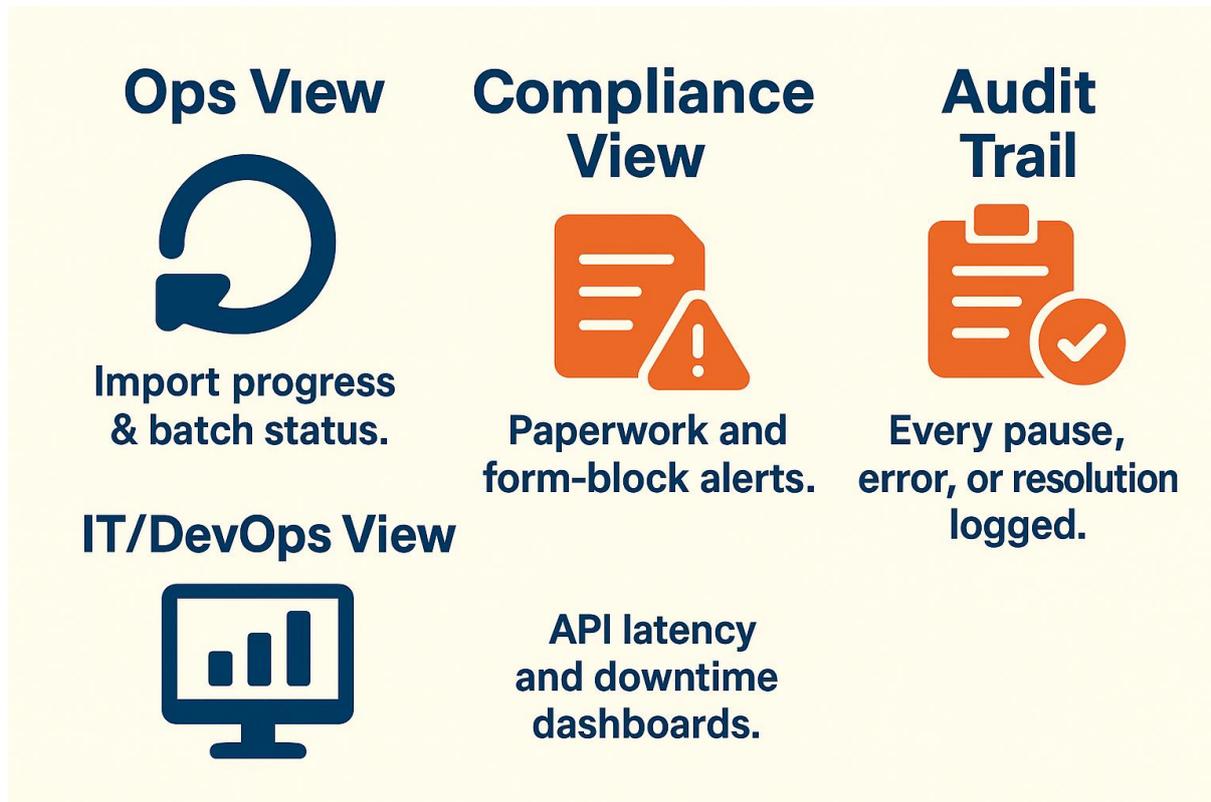
| | |
|--|--|
|  | Make failures transparent → Show clear process stages. |
|  | Empower recovery → Enable stop, resume, skip options. |
|  | Support predictability → Show estimated completion times and downtime schedules. |
|  | Guide compliance → Provide inline instructions for blocked accounts. |
| | Enable cross-team collaboration → Design role-specific views and shared audit trails |

4. Solution Highlights

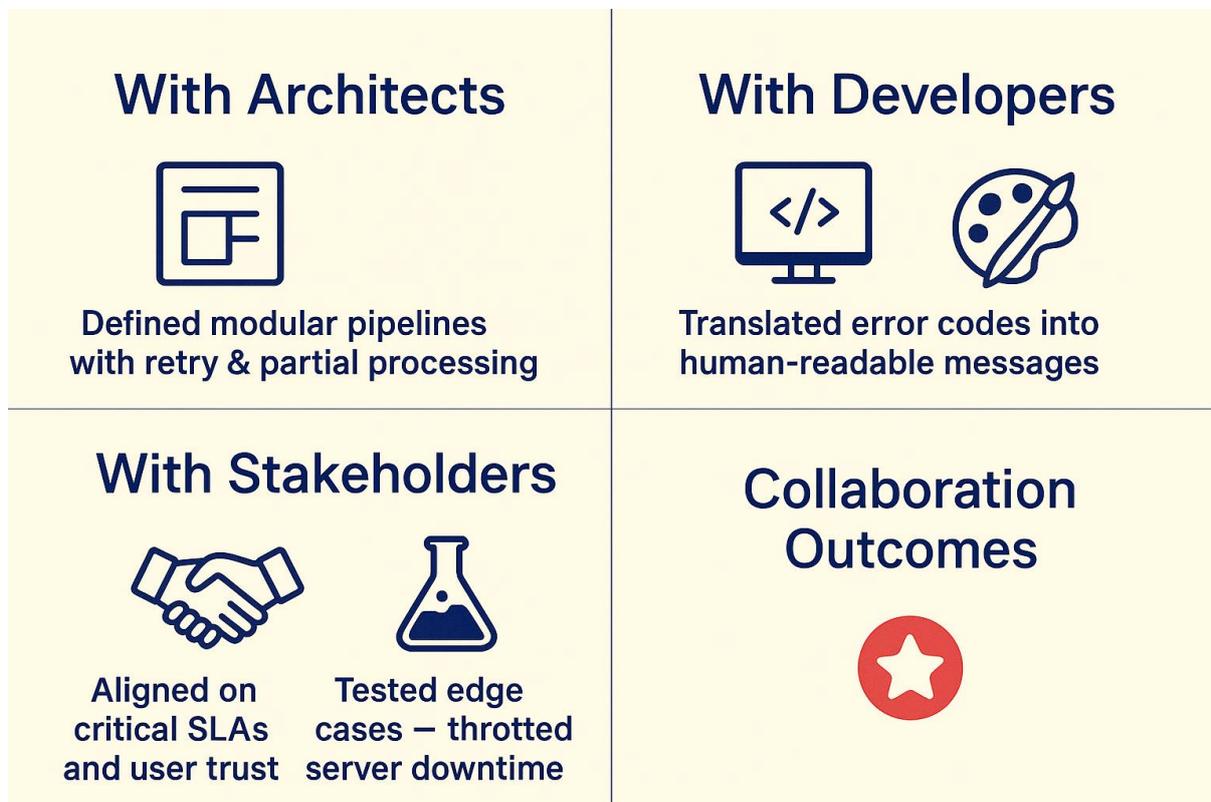
A. Bulk Import Dashboard

| | |
|---|--|
| <p>Visual timeline of stages</p>  <p>Validation → Processing → API Checks → Completion</p> | <p>Contextual error surfacing</p>  |
| <p>Stop / Resume / Skip interactions</p> | <p>interactions</p>  |

C. Collaborative Resolution Framework



5. Collaboration & Roles



- **With Architects:** Defined modular pipelines with retry & partial processing logic.

- **With Developers:** Translated error codes into **human-readable messages**.
- **With Designers:** Built a **calm, trustworthy visual language** (progress bars, severity coding, wait animations).
- **With Stakeholders:** Aligned on **critical SLAs** and user trust goals.
- **With QA:** Tested edge cases — throttled internet, server downtime, compliance exceptions.

6. Adopted UX & Design Principles

| <h1>Collaboration Outcomes</h1> | | |
|---|--|---|
| <p>Service Design Thinking</p>  <p>End-to-end journey across Ops, Compliance</p> | <p>Error Recovery Patterns</p>  <p>Fail gracefully with retry, skip, and resolution</p> | <p>Information Hierarchy</p>  <p>Critical compliance > warnings > minor errors</p> |
| <p>Calm Design</p>  <p>Gentle error messaging and wait-state animations</p> | <p>Design System Alignment</p>  <p>Consistent patterns for progress indicators, modals, alerts</p> | <p>Accessibility</p>  <p>Clear labels, color-blind safe palettes, assistive support</p> |

- **Service Design Thinking** → End-to-end journey across Ops, Compliance, IT.
- **Error Recovery Patterns** → Fail gracefully with retry, skip, and resolution support.
- **Information Hierarchy** → Critical compliance > warnings > minor errors.
- **Calm Design** → Gentle error messaging and wait-state animations.
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- **Accessibility** → Clear labels, color-blind safe palettes, assistive support.

7. Outcomes & Impact

- **Reduced Import Failures** → 40% fewer full reruns due to error recovery options.
- **Improved Trust** → Users reported higher confidence in import reliability.
- **Faster Resolution** → Cross-team collaboration cut average issue resolution time by 25%.
- **Compliance Confidence** → Every action is now auditable, reducing regulatory risk.

8. Reflection (UX Lead Role)

This project highlighted my role as a **bridge between human needs and system complexity**. By co-creating with architects, developers, designers, stakeholders, and QA, we delivered not just an interface but a **resilient service experience**.

The key learning: In fintech, **transparency + control = trust**. Designing for uncertainty (downtime, errors, paperwork) is as important as designing for success.

9. AI tools Used

| | | |
|--|--|--|
| <p>Content Generation</p> <p>ChatGPT / Jasper</p>  <p>Draft reports, emails, and summaries</p> | <p>Design & Prototyping</p> <p>Figma AI / Uizard</p>  <p>Auto-generate UI wireframes</p> | <p>Data Analysis</p> <p>Tableau GPT / Power BI Copilot</p>  <p>Quick insights, charts, dashboards</p> |
| <p>Task Automation</p> <p>Zapier AI / Microsoft Copilot Studio</p>  <p>Automate workflows</p> | <p>User Research</p> <p>Maze / Useberry AI</p>  <p>AI-powered usability testing</p> | <p>Accessibility</p> <p>Stark AI / Microsoft Accessibility Insights</p>  <p>Auto-check WCAG compliance</p> |