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

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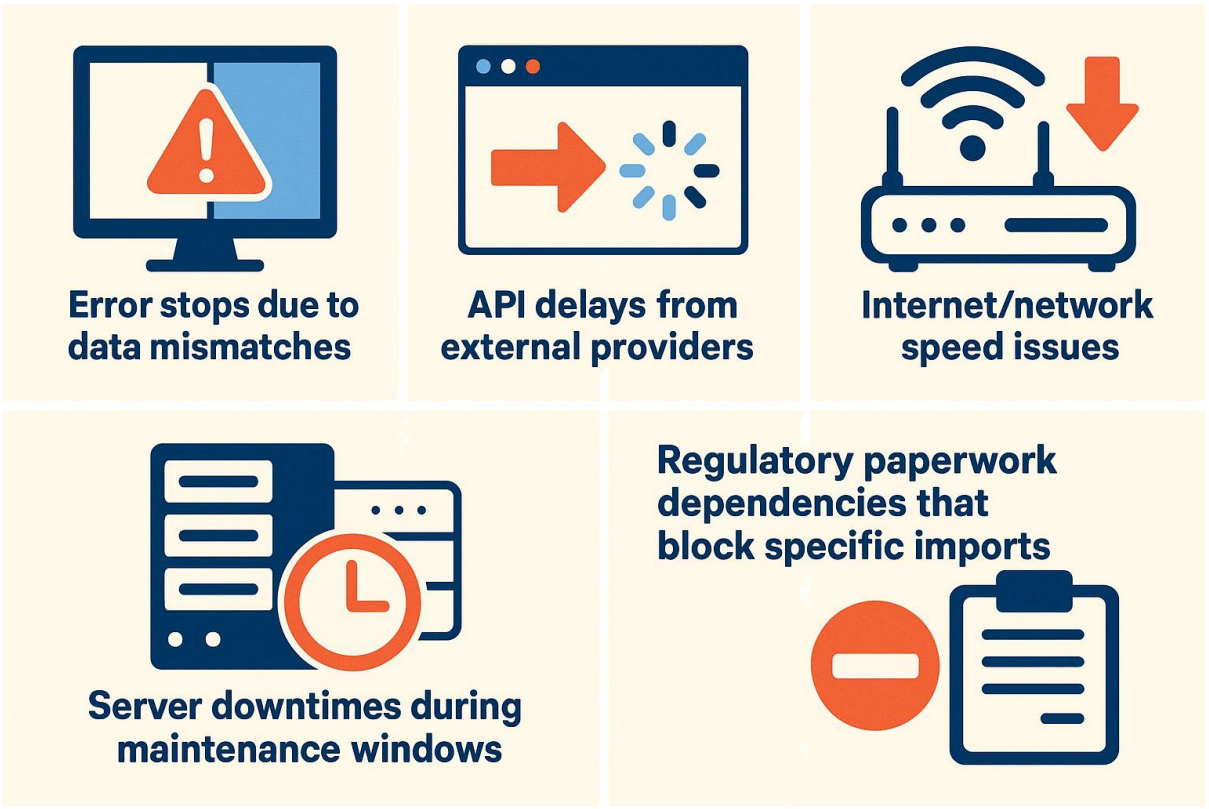
**1. Problem Statement**

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.

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**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.

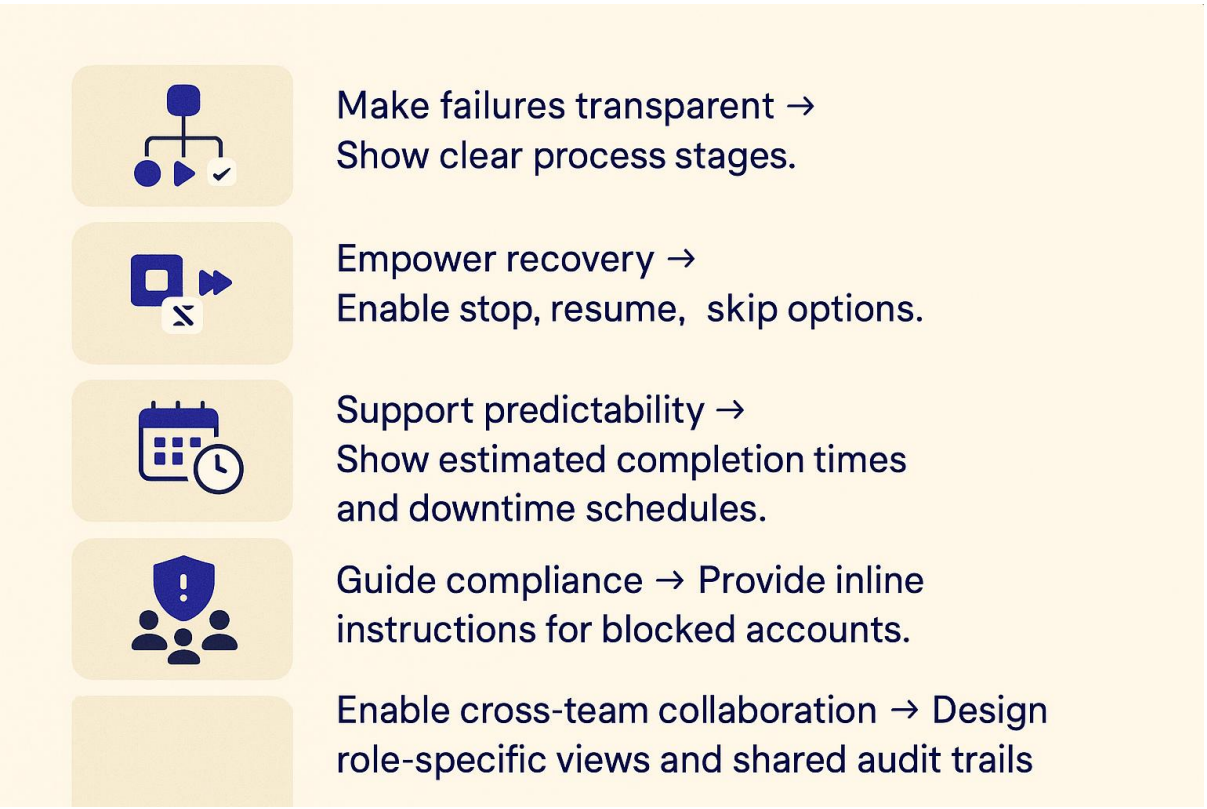
## System downtime

is unavoidable but must be communicated gracefully.

### 3. Design Approach (UX Lead Perspective)

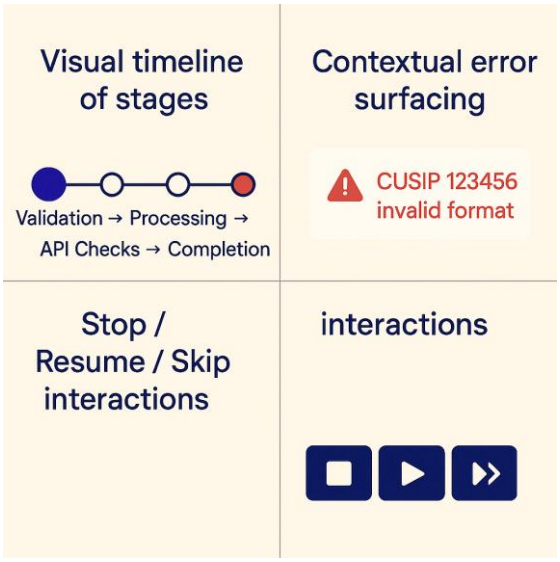
As **Anjithpal (UX Lead)**, I adopted a **service design mindset** — balancing user empathy, technical feasibility, and compliance requirements.

**Core UX Goals**

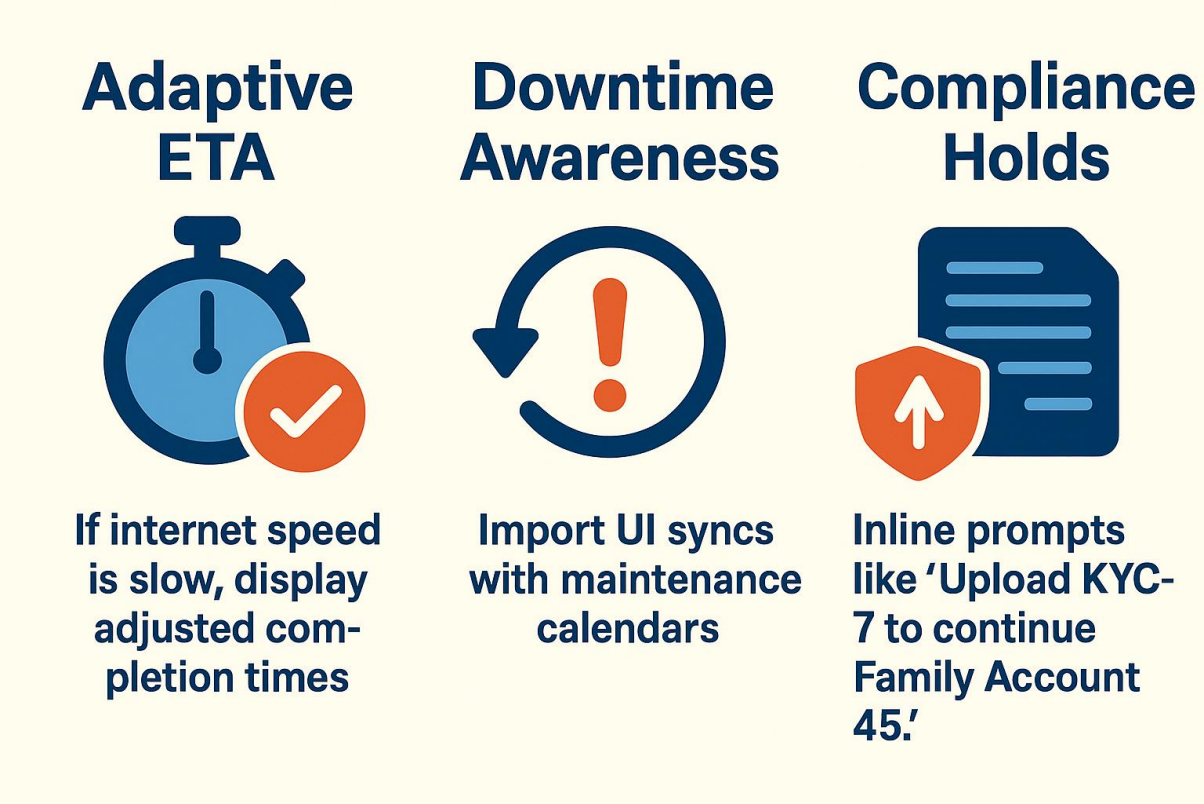


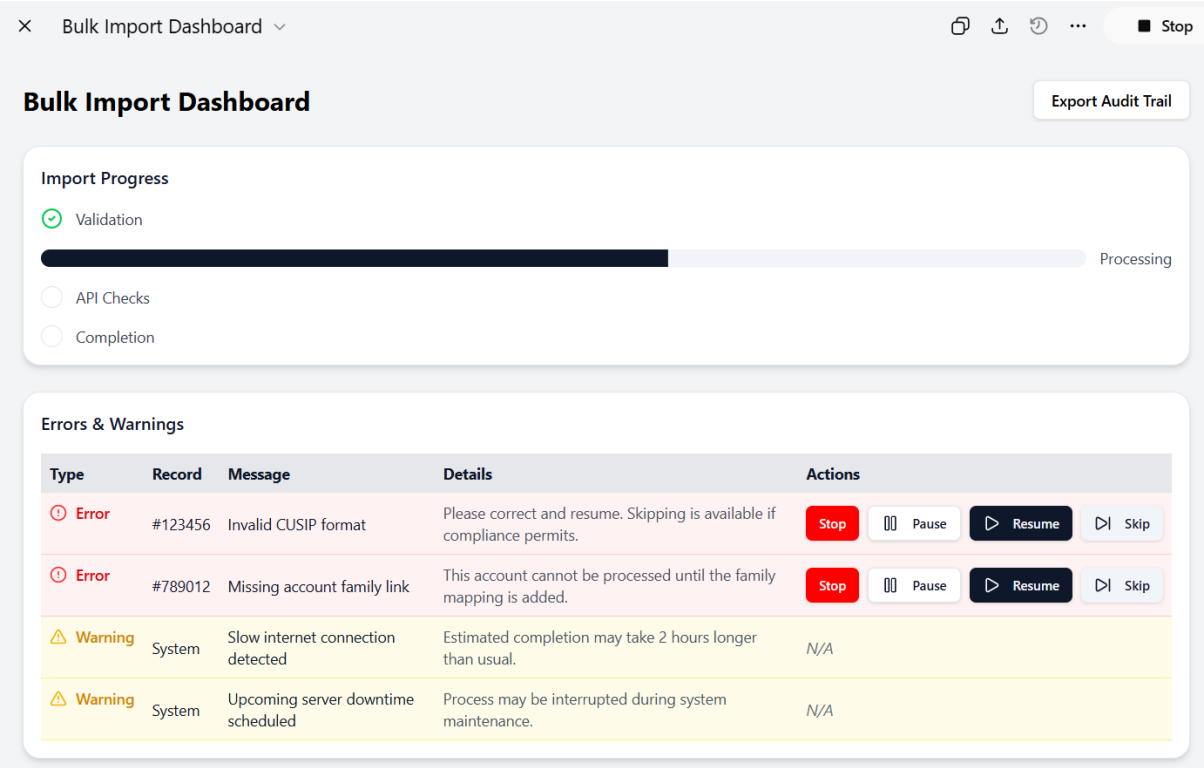

### 4. Solution Highlights

**A. Bulk Import Dashboard**

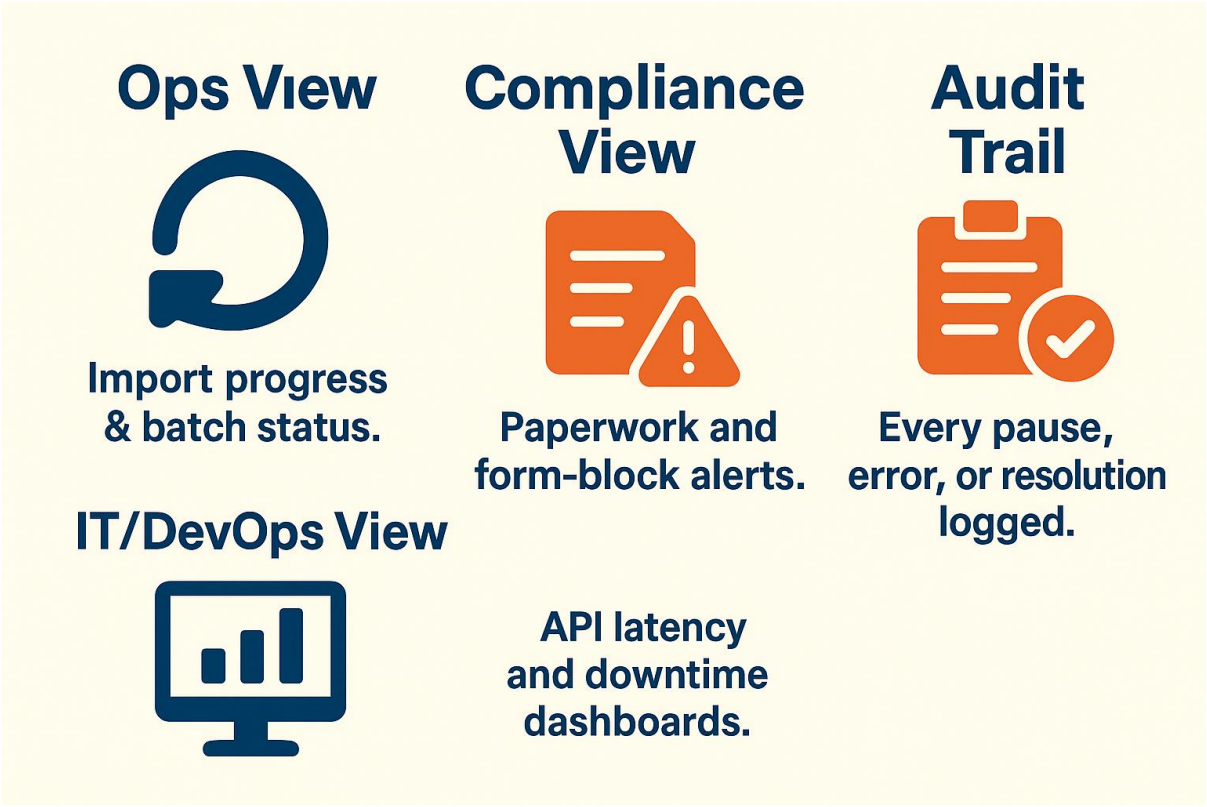


## B. Intelligent Notifications & Wait States



**C. Collaborative Resolution Framework**

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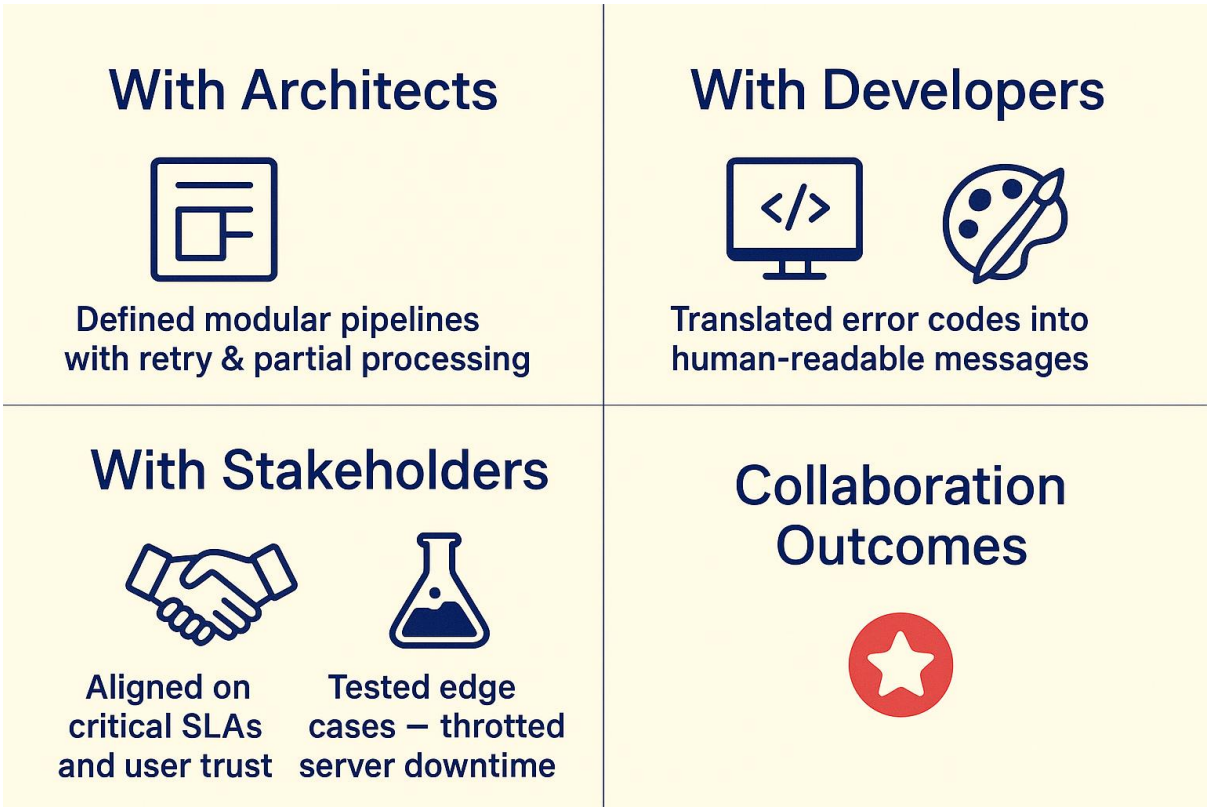
**5. Collaboration & Roles**




- **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.

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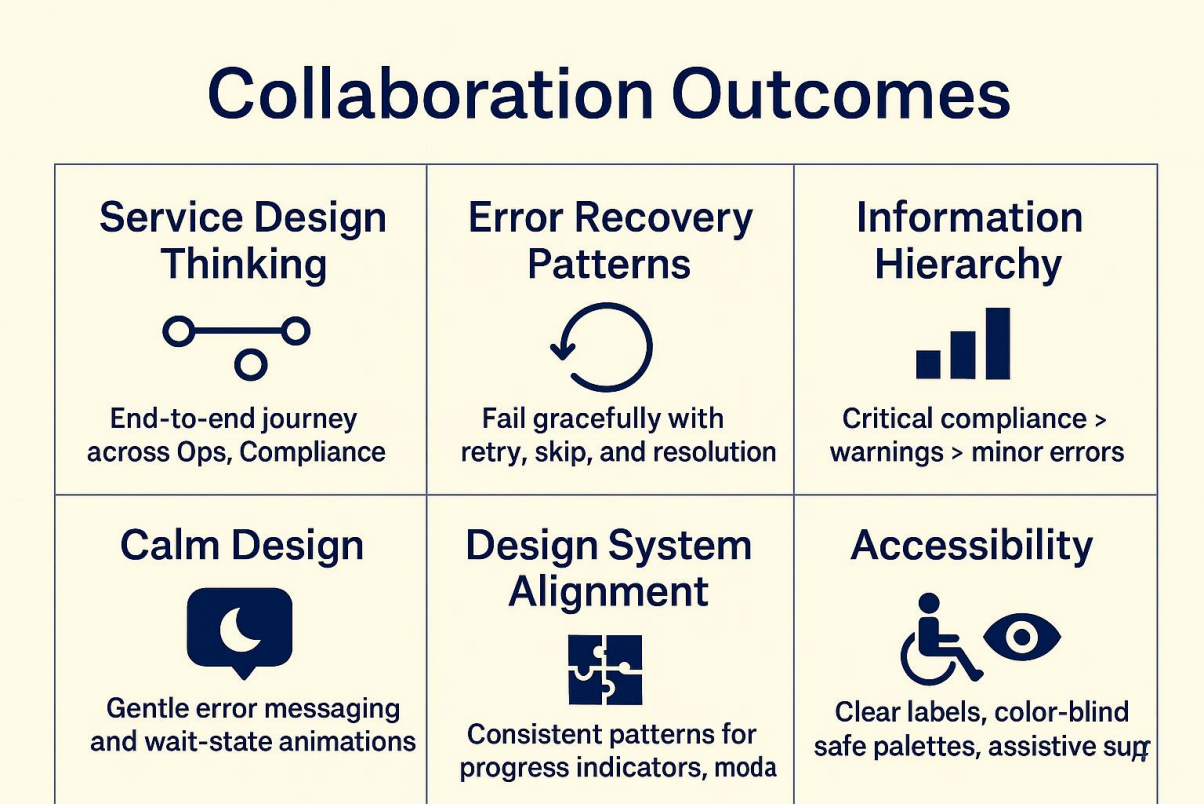
**6. Adopted UX & Design Principles**




- **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.
- **Design System Alignment** → Consistent patterns for progress indicators, modals, alerts.
- **Accessibility** → Clear labels, color-blind safe palettes, assistive support.

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**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.

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**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.

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**9.AI tools Used**