Hey, I'm Elran Levy

Lead Product Design with a passion for simplifying complex problems.

Clarity, trust, and usability are at the core of every decision I make. I believe that great design should simplify complex domains without dumbing them down - it should be intuitive, impactful, and built for real user needs.

Good design is as little design as possible

- Dieter Rams

SELECTED WORK

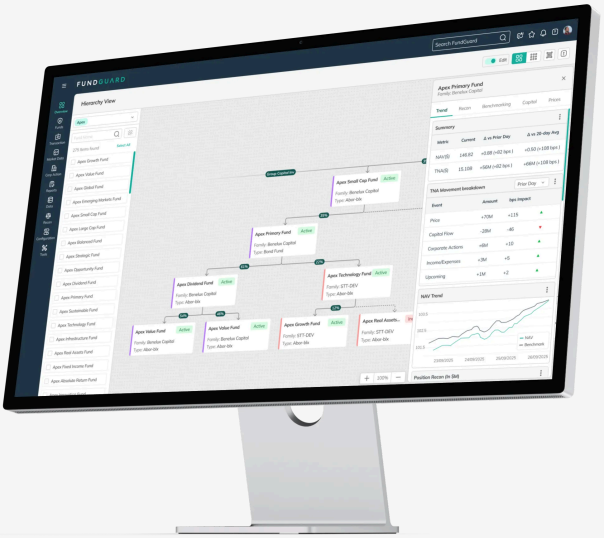
Let's dive into details with a selection of my recent work

ENTERPRISE FINTECH B2B

Fundguard

Turning Operational Complexity into Clear, Actionable Systems.
Designing scalable workflows for investment operations teams.

Read Case Study →



WORK MANAGEMENT MONETIZATION

monday.com

Designing monetization and conversion experiences for a work management platform used by millions of users worldwide.

Read Case Study →

MOBILE APP B2C

bit - app

Israel's leading P2P payments app - designing a lean, data-driven money transfer experience for millions of users.

Read Case Study →

SMB BANKING B2C

Bluevine

Designing banking and lending experiences that help small businesses manage their finances quickly and confidently.

Read Case Study →

ENTERPRISE DATA PLATFORM

Xtream IO

An all-flash storage platform delivering high performance, scalability, and simplified data management for enterprise.

Read Case Study →

FUNDGUARD

Turning operational complexity into control

When experts need systems they can trust

ROLE

Head of Product Design

TEAM

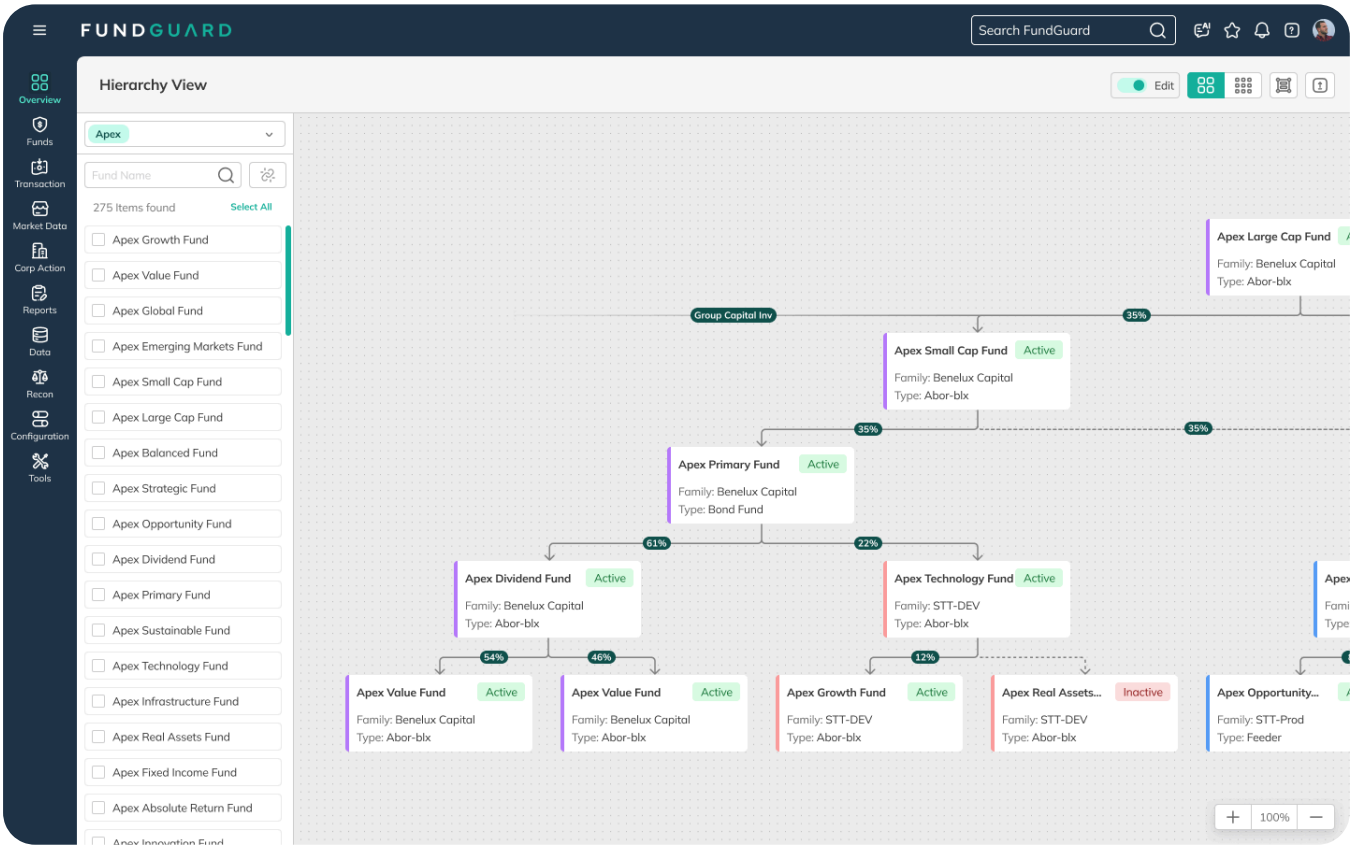
PM · 6 Engineers · Data Science · Enterprise Operations

SCOPE

Core reconciliation & fund hierarchy workflows

IMPACT

+30% automation adoption · 25% faster resolution · Reduced config errors



CONTEXT

Fund operations are living systems.

They involve complex structures, time-based workflows, financial dependencies, and errors that silently propagate downstream. Yet the product represented this complexity through dense tables and fragmented dashboards.

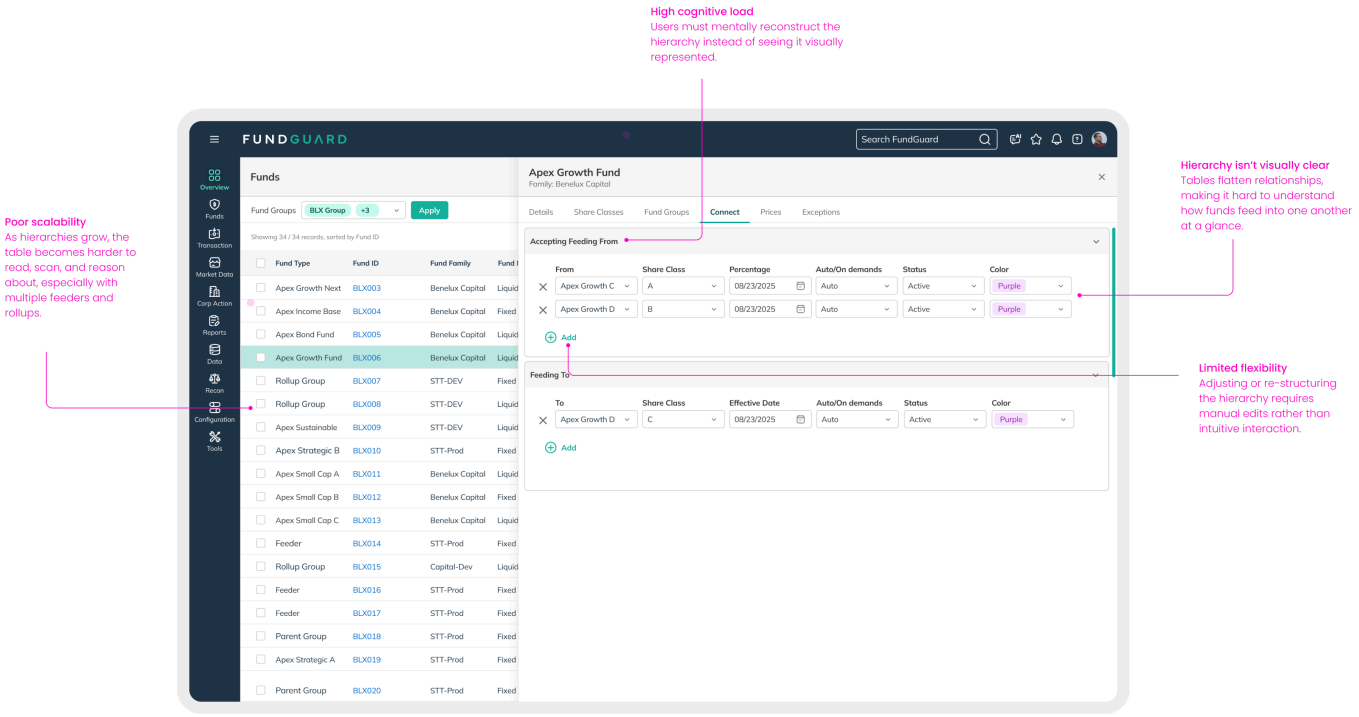
Deep parent-child fund structures

Time-based workflows

Financial allocations & dependencies

Errors that propagate downstream

> *Tables hide system logic.*
>
> Experts needed to reason about structure - not edit rows.



THE CHALLENGE

Enterprise users relied on manual reconciliation despite built-in automation.

The system technically worked. But users did not trust it.

- AI outputs lacked transparency
- Data density created cognitive overload
- Fund relationships were abstract and row-based
- System state was fragmented across screens

CORE TENSION

The problem wasn't functionality.
It was orientation and confidence.

WHAT USERS TOLD US

> *"I'm always worried that one wrong configuration will move funds incorrectly, and it's hard to trace mistakes after they happen."*

– FINANCE MANAGER

> *“The system technically works, but everyday actions take too many steps.”*
>
> – SENIOR ACCOUNTANT

> *“Updating fund data feels risky – I only find errors after reports are generated.”*
>
> – ACCOUNTANT

> *“Managing multiple funds feels fragmented. I constantly jump between screens.”*
>
> – OPERATIONS LEAD

Experts don’t need more power. They need clarity they can rely on.

KEY INSIGHT

Users manually verified automated results – even when accuracy was high.

Not because automation failed.
Because system logic was invisible.

The core barrier was trust in system state.

HYPOTHESIS-DRIVEN DESIGN

H1 Users struggle to understand fund relationships when configuration is row-based.

PROBLEM

- Connections split across "Feeding To" and "Accepting From"
- Relationships exist across multiple rows
- Users must mentally reconstruct structure

HYPOTHESIS

If fund relationships are visualized as a connected hierarchy instead of separated rows, users understand system structure faster and make fewer configuration mistakes.

H2 Users lack confidence because they cannot validate full system state in one place.

PROBLEM

- Status, allocation %, class, and direction spread across inputs
- No single source-of-truth view
- Downstream impact unclear

HYPOTHESIS

If users can see all funds, states, and allocations in one visual system map, they configure connections with higher confidence and fewer errors.

DESIGN PRINCIPLE

Expose structure before interaction.

Relationships are spatial, not abstract

Identity, type, and status visible immediately

System logic visible before editing

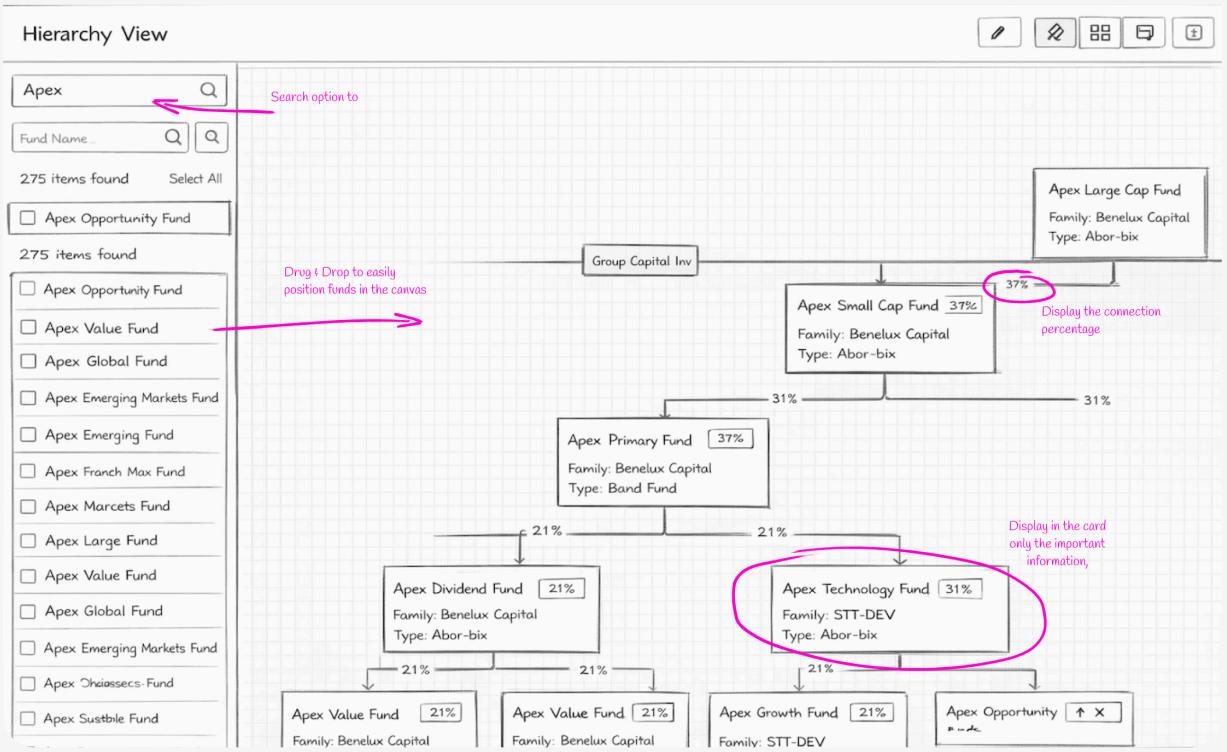
Drag-and-drop mirrors mental models

The goal wasn't speed. It was confidence.

Hierarchy View (Canvas-Based)

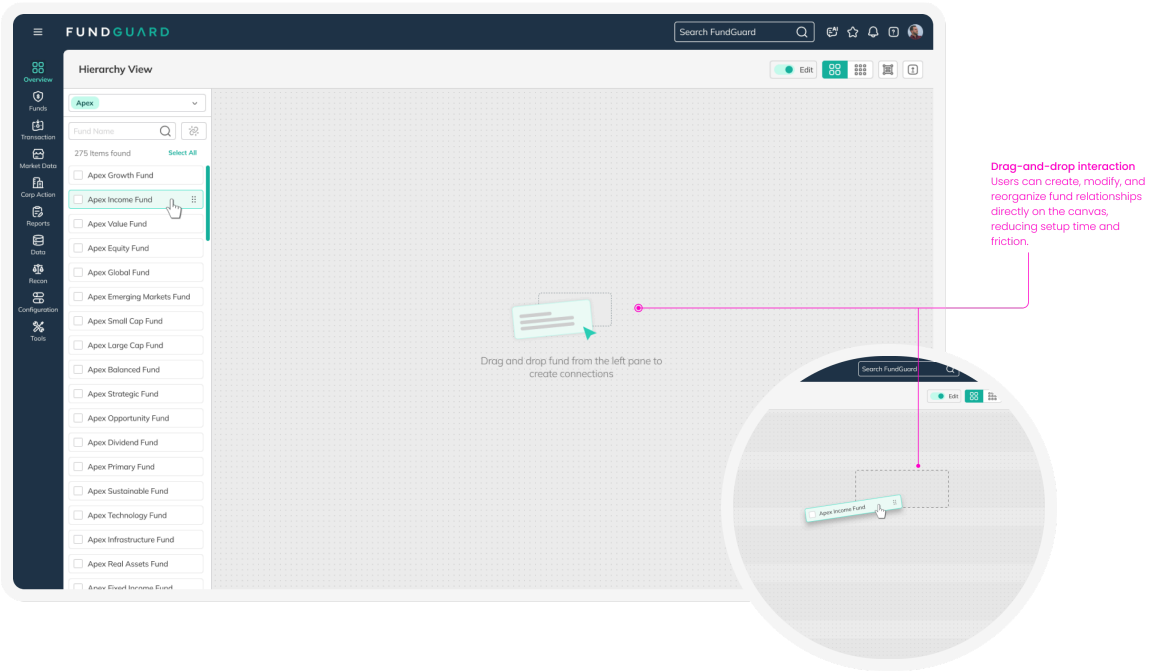
A visual, intuitive way to build fund hierarchies

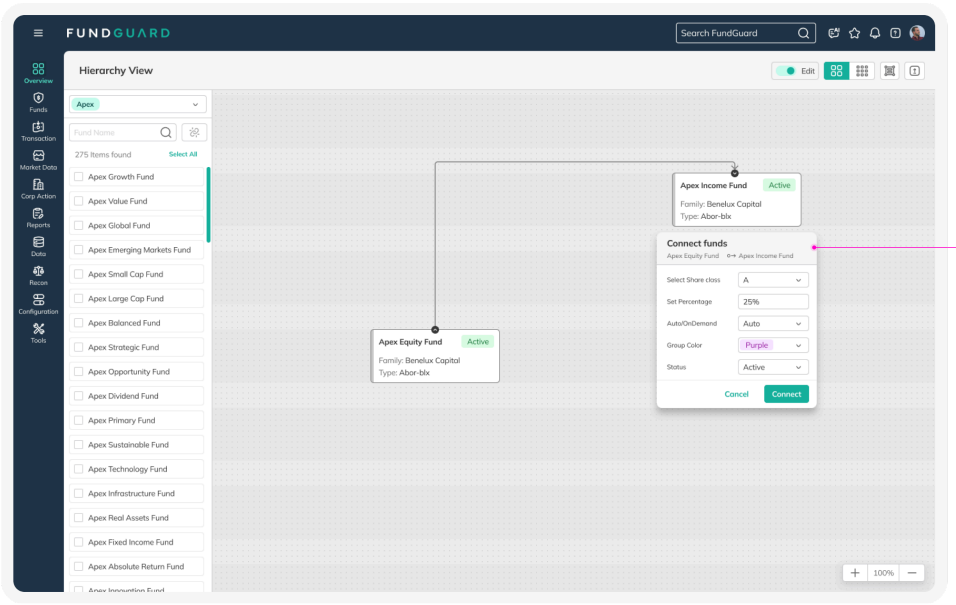
This new hierarchy view replaces the legacy table-based structure with a canvas-driven, drag-and-drop experience. Funds are represented as nodes, and their relationships are shown visually, making complex structures easy to understand and manage.



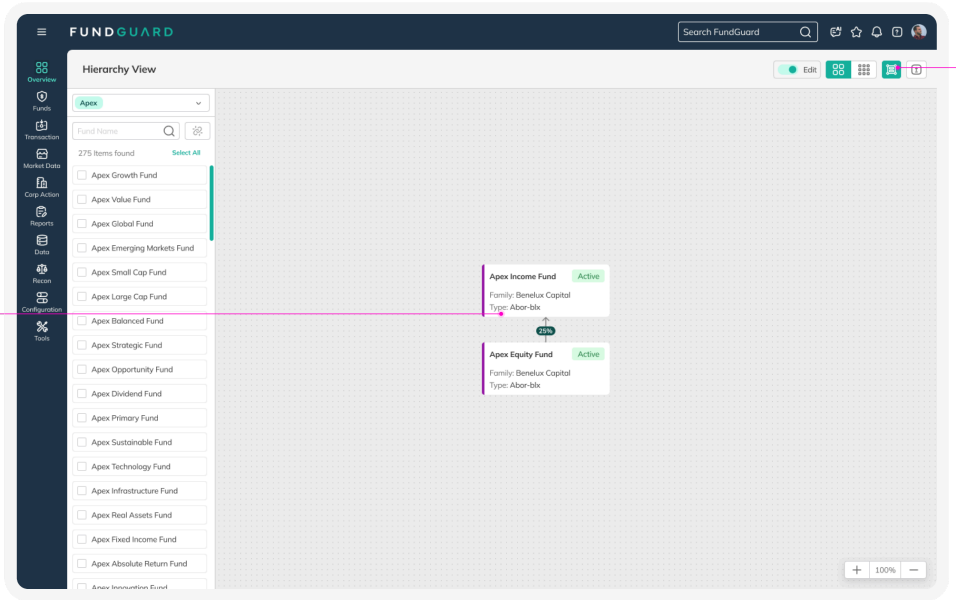
DESIGN FLOW

Explore structure before interaction



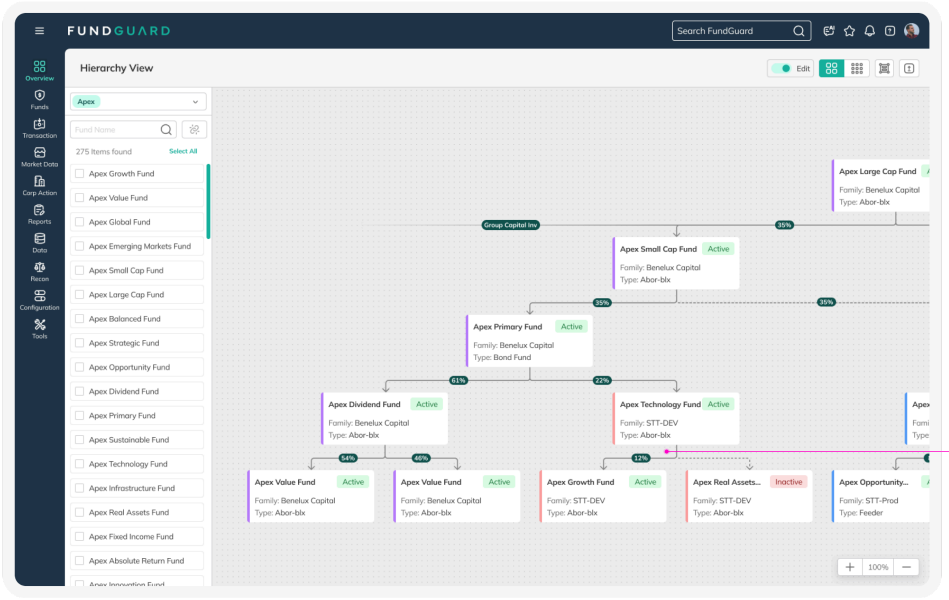


Lower risk of configuration errors
Relationships are created through visual connections, minimizing incorrect mappings and missed dependencies.



Lower risk of configuration errors elationships are created through visual connections, minimizing incorrect mappings and missed dependencies.

A new function has been added to automatically re-group connections based on hierarchy order and parent-child relationships.



Scales with complexity
Large and multi-level hierarchies remain readable and navigable as structures grow.

THE SOLUTION

Four connected system improvements

01

Canvas-Based Fund Hierarchy

A visual, drag-and-drop hierarchy replaced the legacy table structure. Funds represented as nodes, allocations displayed directly on connections, status visible at a glance.

From editing rows → to understanding structure.

02

Guided Reconciliation Workflow

Replaced dashboard-heavy navigation with structured progression: clear checkpoints, visible state transitions, context-aware actions, reduced tab switching.

03

Intelligent Exception Handling

Risk-based prioritization with financial impact surfaced first. Contextual resolution tools reduced cognitive overload.

04

Explainable AI

Confidence indicators, traceable reasoning paths, audit trail visibility, and clear anomaly signals. Automation became inspectable - not opaque.

RESULTS

Measurable impact across the platform

+30%

increase in automation adoption

25%

faster exception resolution

Reduction in reconciliation-related support tickets

Fewer configuration errors

Increased enterprise expansion into advanced modules

> *Most importantly: Users stopped manually validating every automated result.*
>
> **They trusted the system state.**

NEXT CASE STUDY
monday.com →

monday.com

Optimizing monetization and plan selection at scale

Designing confidence at the moment of commitment

ROLE

Senior Product Designer

TEAM

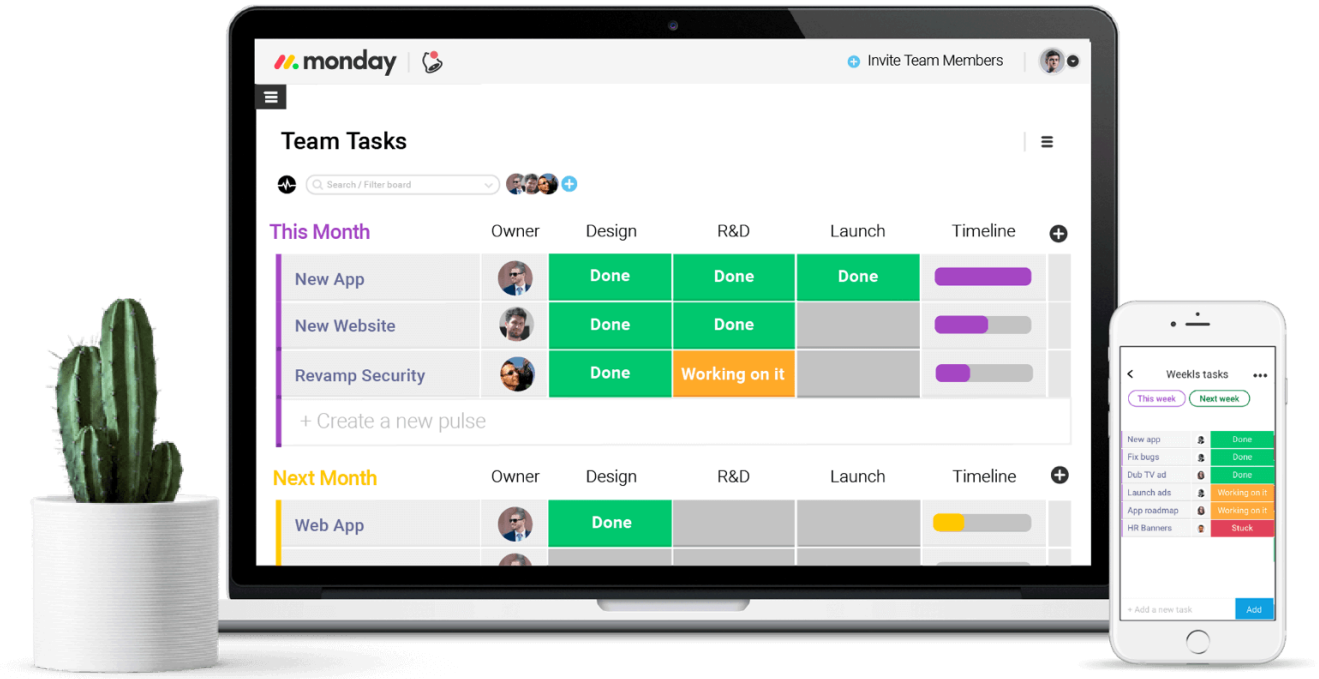
Growth Squad (PM · Engineering · Data)

SCOPE

Registration, upgrade, plan selection

IMPACT

+7% reg-to-plan conversion · 35% Pro uplift



CONTEXT

Millions of users completed the trial.

Engagement was strong.

Usage was high.

But when the trial ended, conversion dropped sharply.

The pricing table was clear. The plans were defined. Yet users hesitated.

> *"Each plan supports a different workflow, but comparing them felt overwhelming. I was afraid of choosing the wrong tier."*

> *This wasn't pricing sensitivity.*
> *It was decision anxiety.*

THE CHALLENGE

The end of a free trial is not neutral.

It is a moment of commitment under uncertainty.

WHAT WE OBSERVED:

- Sharp drop-off at plan selection
- Repeated hesitation between Standard and Pro
- Users leaving instead of choosing "wrong"
- High engagement during trial, low confidence at upgrade

USERS WEREN'T ASKING:

"Is this worth the money?"

THEY WERE ASKING:

Which plan fits how we actually work?

Am I locking us into the wrong choice?

What if we outgrow this next month?

KEY INSIGHT

Abandonment wasn't rejection - it was avoidance.

When the perceived cost of a wrong decision felt higher than the value of continuing, users left.

MONETIZATION

RECOMMENDATION

EXPERIMENTS

My Ownership

- Led end-to-end design of upgrade and monetization flows
- Designed logic-driven plan recommendation system
- Partnered with Data on behavioral segmentation
- Translated usage patterns into recommendation signals
- Ran controlled A/B experiments within the growth squad
- Designed contextual feature promotion surfaces

CORE INSIGHT

Users didn’t struggle with pricing.

They struggled with choosing the right plan.

Good monetization UX doesn’t push users to pay. It removes the fear of saying yes.

HYPOTHESIS-DRIVEN DESIGN

H1 **If users see a plan recommendation based on their own activity, they feel more confident selecting a plan.**

Instead of forcing self-diagnosis, we analyzed trial usage and surfaced: “Recommended for you - based on your activity.”

- Anchors decision in personal data
- Reduces cognitive load
- Shifts product from seller → advisor

H2 **If users can visually compare how their usage maps to each plan, they better understand value differences.**

WE INTRODUCED

- Usage breakdown (Boards, Views, Dashboards, Workload)
- Color-coded alignment indicators
- Clear visibility of plan gaps

RESULT

Fewer accidental under-selections and reduced downgrade regret.

H3 **If recommended plans highlight outcomes - not just features - users perceive higher value and convert faster.**

INSTEAD OF LISTING FEATURES, WE FRAMED BENEFITS

Team visibility | Capacity planning | Workflow scalability

Upgrade felt like continuation - not escalation.

THE APPROACH

Four connected improvements

01 **Reframe Plan Comparison**

Shift from abstract feature tables to use-case-driven clarity: how your team actually works.

02 **Personalized Plan Recommendations**

A logic-driven system analyzed real usage signals and surfaced recommended tier, usage justification, and visible alignment gaps. Decision support replaced guesswork.

03 **Simplify the Commitment Moment**

Reduced redundant comparison loops, overwhelming feature density, and clarified reversibility. Lower the risk of choosing - not the price.

04 **A/B Testing Value Framing**

Tested two upgrade experiences to validate that evidence-based messaging outperforms generic copy.

VARIANT A VARIANT B VALIDATION

A/B Test: Pro Recommendation

We tested two upgrade experiences to validate evidence-based messaging.

Variant A

Recommendation + Feature explanation + "Why" banner

Mental model: "Trust us - Pro is better for you."

Variant B

Recommendation + Usage proof + Recommendation

Mental model: "Here's evidence - Pro fits how you work."

Based on your activity during the trial.

We recommend the Pro plan for your work

Standard plan

- Mainly use board views
- Don't need dashboards or workload tracking
- Only 3 dashboards included
- No access to workload tracking

Continue with Standard

Recommended for you

Pro plan

- You used Dashboards and Workload views
- These features unlock team visibility and capacity planning
- Unlimited dashboards
- Workload tracking & planning

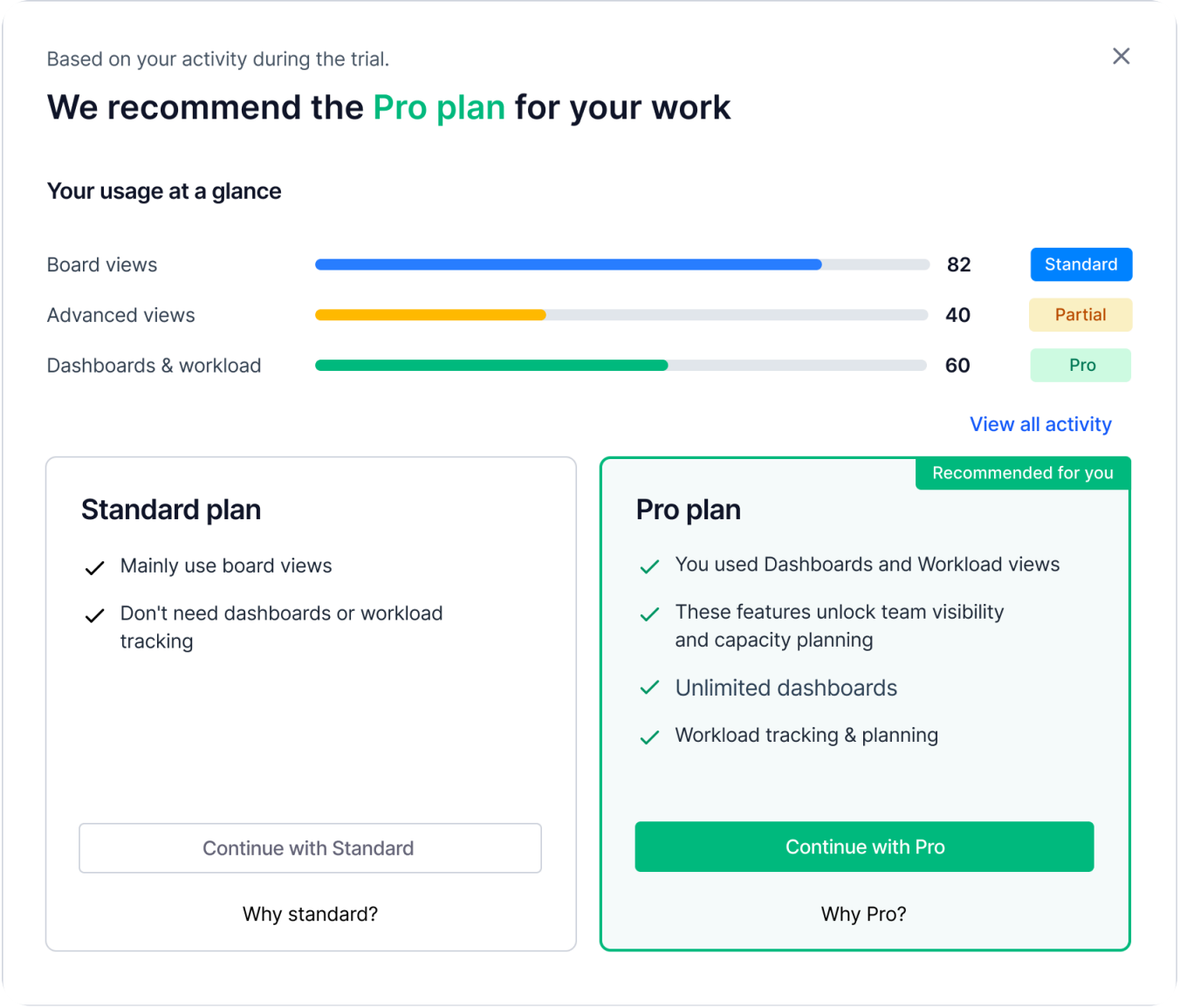
Continue with Pro

Why this matters

You're already working across multiple views. Pro brings everything together with unlimited dashboards and workload planning — helping you track progress faster and run work more efficiently.

See all plans

Continue with Pro

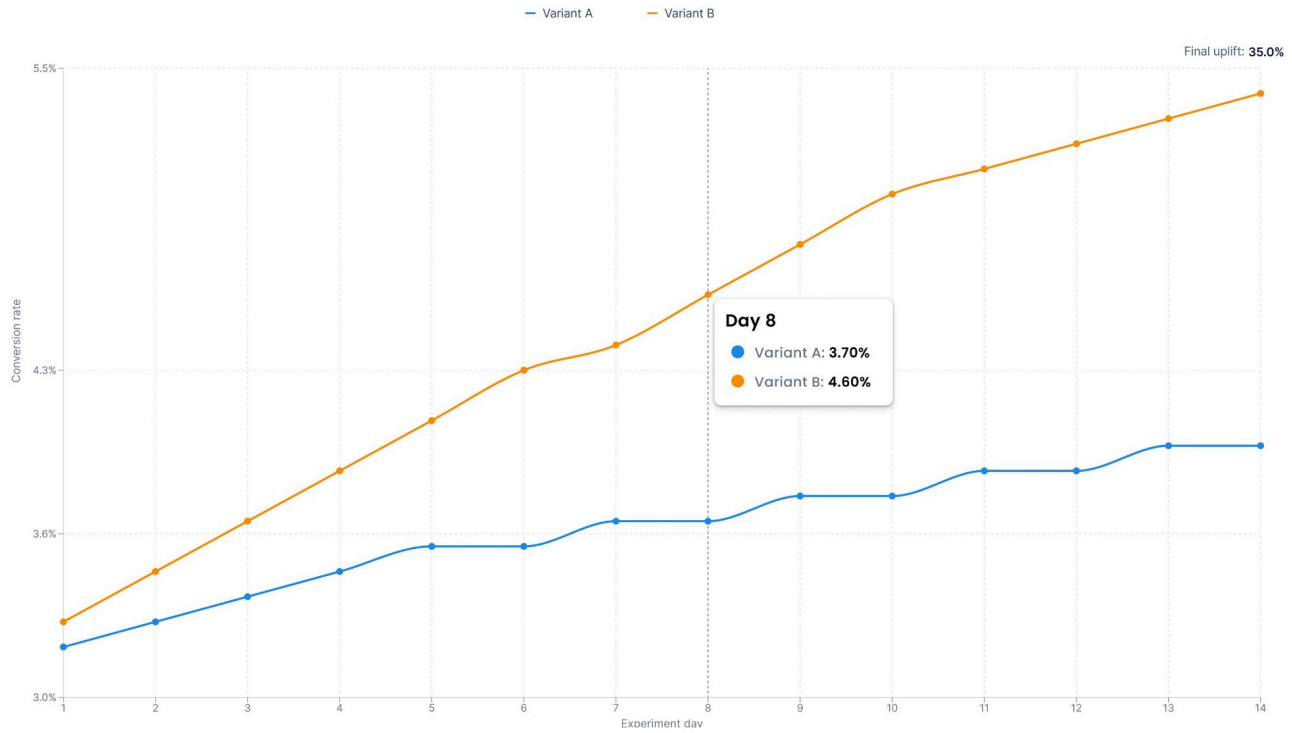


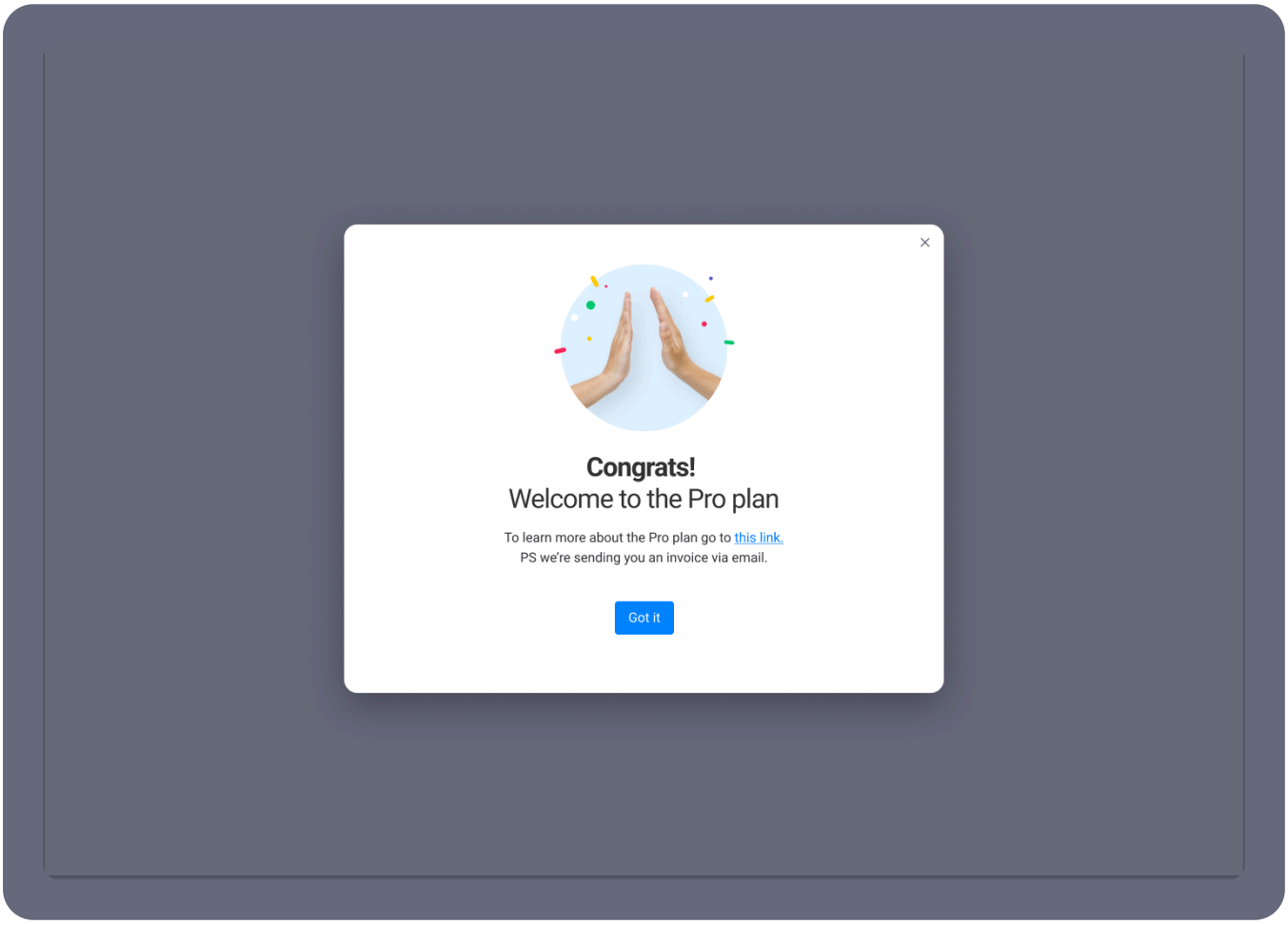
Usage-Driven Recommendations Increased Pro Conversions by 35%

We tested two upgrade experiences - a generic recommendation vs. a usage-based personalized recommendation - to measure impact on Pro conversion. The usage-driven experience increased conversion from 4.0% to 5.4%, delivering a 35% relative uplift and higher user trust in the upgrade recommendation.

Variant A vs Variant B - daily cumulative conversion rate

A/B Test Conversion Trend





VALIDATION

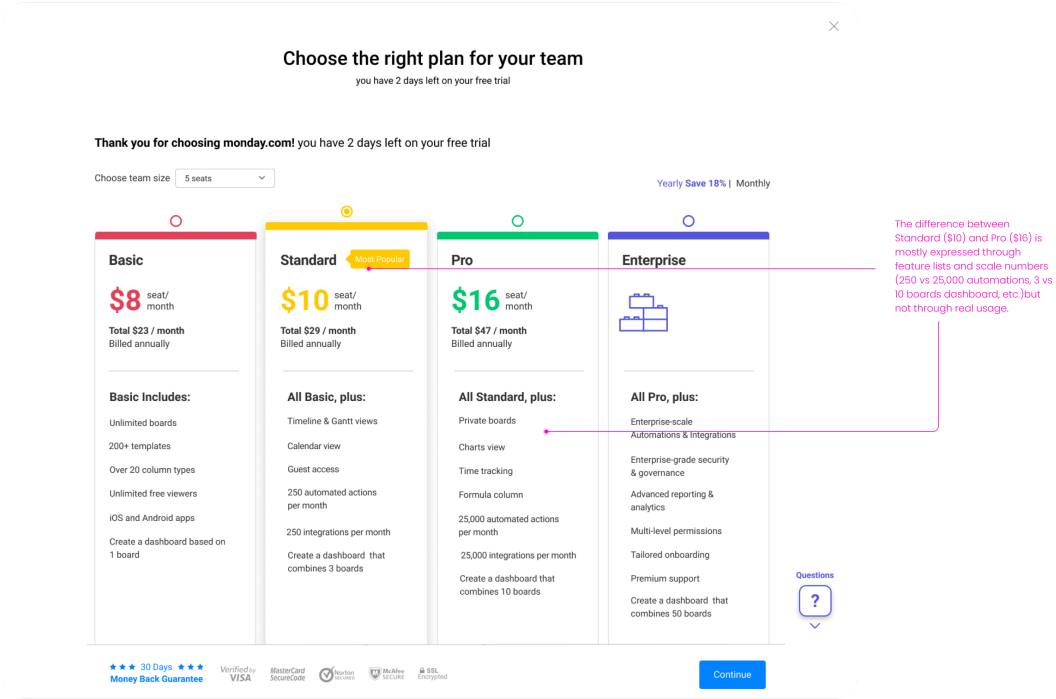
- Conversion: 4.0% → 5.4%

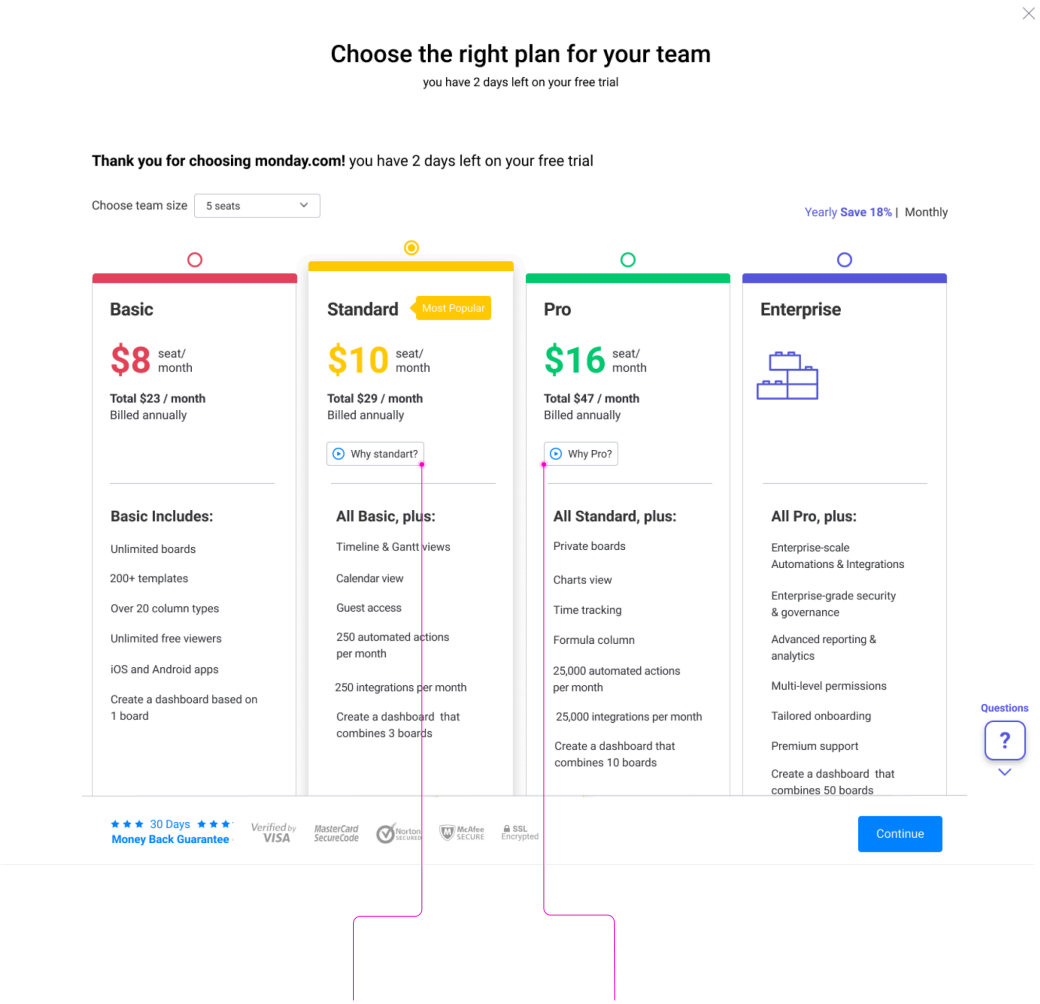
- 35% relative uplift in Pro upgrades
- Stronger cumulative daily conversion trend

> *Evidence builds confidence. Confidence drives commitment.*

Visual Guidance for Plan Selection

Short explainer videos turn abstract feature lists into real usage stories, helping users quickly understand which plan fits them best.




Choose the right plan for your team
you have 2 days left on your free trial
Thank you for choosing monday.com! you have 2 days left on your free trial
Choose team size
5 seats
Yearly Save 18% | Monthly
Basic
$8 seat/ month
Total $23 / month
Billed annually
Basic Includes:
Unlimited boards
200+ templates
Over 20 column types
Unlimited free viewers
iOS and Android apps
Create a dashboard based on 1 board
Standard
Most Popular
$10 seat/ month
Total $29 / month
Billed annually
Why standart?
All Basic, plus:
Timeline & Gantt views
Calendar view
Guest access
250 automated actions per month
250 integrations per month
Create a dashboard that combines 3 boards
Pro
$16 seat/ month
Total $47 / month
Billed annually
Why Pro?
All Standard, plus:
Private boards
Charts view
Time tracking
Formula column
25,000 automated actions per month
25,000 integrations per month
Create a dashboard that combines 10 boards
Enterprise
All Pro, plus:
Enterprise-scale Automations & Integrations
Enterprise-grade security & governance
Advanced reporting & analytics
Multi-level permissions
Tailored onboarding
Premium support
Create a dashboard that combines 50 boards
Questions
30 Days Money Back Guarantee
Continue

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Promoting Discovery Through Value

Instead of gating features behind friction, we surfaced premium capabilities contextually.

- Timeline → show capacity planning
- Automation → show workflow scale
- Advanced views → show operational clarity

This reframed locked features from restriction → opportunity. The upgrade became a natural next step.

RESULTS

Measurable impact across the funnel

+7%

registration-to-plan conversion

35%

relative uplift in Pro upgrades

Increased plan clarity and decision speed

Reduced downgrade regret

Higher long-term plan alignment

> *Most importantly: Users stopped hovering. They started choosing.*

Plan selection shifted from feature comparison under pressure

→ Guided, usage-driven decision confidence

The moment of commitment became safer.

And when choosing feels safe - growth follows.

NEXT CASE STUDY

Bit →

BIT

Designing consumer fintech at national scale

When speed and trust are non-negotiable

ROLE

Senior UX Specialist

TEAM

PM · Engineering · Growth · Marketing

SCOPE

Core payment flows · Activation · Engagement

SCALE

#1 tier-2 P2P payment app · 2M+ users

CONTEXT

Bit operates at massive consumer scale.

Small UX issues directly impact usage

Friction reduces repeat behavior

Confusion destroys trust instantly

Sending money is not a neutral action.

It is high-stress.

> *“I was always worried about making a mistake and sending money to the wrong place.”*

> *“Between passwords, codes, and approvals, the process was confusing.”*

> *“Transferring money wasn't convenient, so I avoided it unless I had to.”*

> *Trust and speed weren’t features.*
> *They were survival conditions.*

THE PROBLEM

BIT NEEDED:

- Extreme simplicity to drive viral adoption
- Low cognitive load for everyday use
- Transfers that feel instant
- Zero tolerance for ambiguity

BUT PAYMENT FLOWS ARE:

Legally complex | Technically constrained | High-risk | Emotionally sensitive

One unclear state = loss of trust.

Compress a complex financial transaction into a flow that feels obvious and safe.

PAYMENTS ACTIVATION CLARITY

My Ownership

- Designed core transfer and payment flows
- Optimized activation and first-use experience
- Improved clarity around transaction states
- Partnered with Growth on engagement experiments
- Worked closely with Engineering on performance and edge cases
- Reduced friction through micro-decisions

Making a Complex Flow Feel Simple

DESIGN PRINCIPLE

"One decision per screen."

I intentionally stripped each step down to a single mental action:

1. Who am I paying?

Choose the person you want to send money to. Double-check the name to avoid mistakes.

---

2. How much am I sending?

Enter the amount you want to transfer. You'll see the total before it's sent.

---

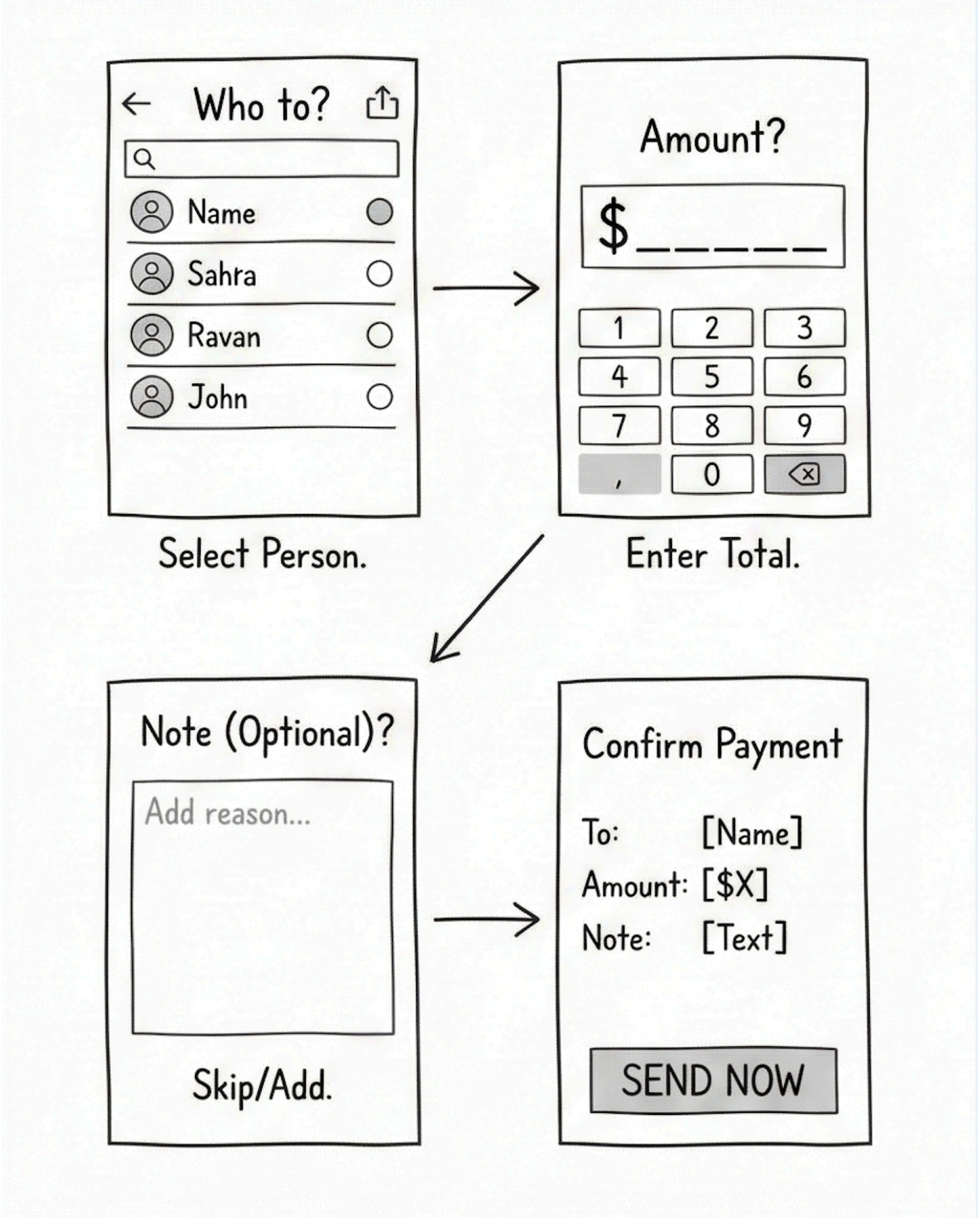
3. Why (optional, social context)?

Add a short note to explain the payment. It helps keep things clear and personal.

---

4. Confirm with full clarity

Review the details one last time. When everything looks right, send with confidence.



Each screen removes noise and answers only the question users have at that moment.

Lean design wasn't a style choice - it was a usability strategy.

KEY INSIGHT

Users don’t think in “financial steps.” They think in:

Person → Amount → Confirmation

That insight became the backbone of the flow.

In payments, speed builds trust.
Uncertainty destroys it.

THE APPROACH

Four connected improvements

01

Reduce Cognitive Load in Transfer Flows

One decision per screen. Instead of multi-field forms, I structured the flow around single mental actions: Who am I paying? How much? Why (optional)? Confirm with full clarity. Lean design wasn't a style choice - it was a usability strategy.

02

Clarify Transaction States

High-frequency payments require state transparency: clear loading indicators, explicit success confirmation, no ambiguous "pending" confusion, and visible feedback loops. We designed transaction clarity as a trust mechanism - not a UI detail.

03

Improve First-Use Activation

Instead of heavy onboarding: Intent → Selection → Completion. Progressive disclosure, context retention, and immediate reward after first transfer. Make the first successful transfer feel effortless - because first success drives repeat usage.

04

Optimize Micro-Interactions

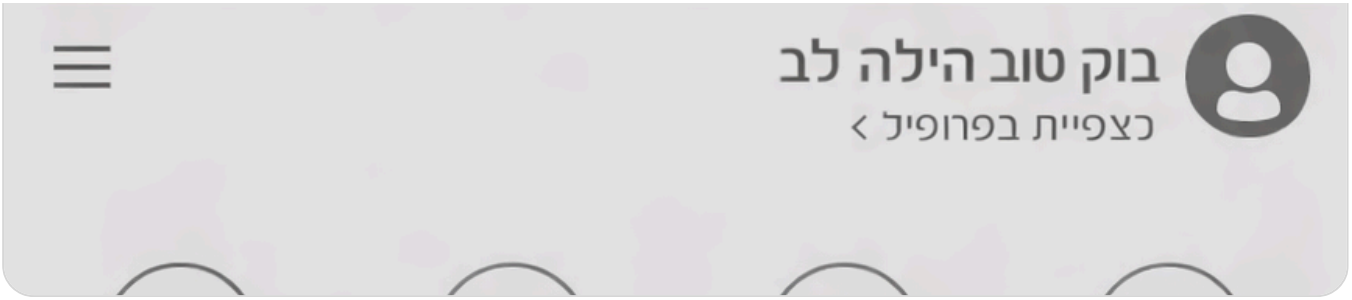
Subtle animated transitions, responsive feedback, and visual continuity between steps. From first tap to final confirmation, the flow felt continuous - not fragmented. Speed mattered more than polish. Decisions were made quickly - but never blindly.

DESIGN PHILOSOPHY IN ACTION

Instead of heavy upfront research, I focused on rapid signal reading:

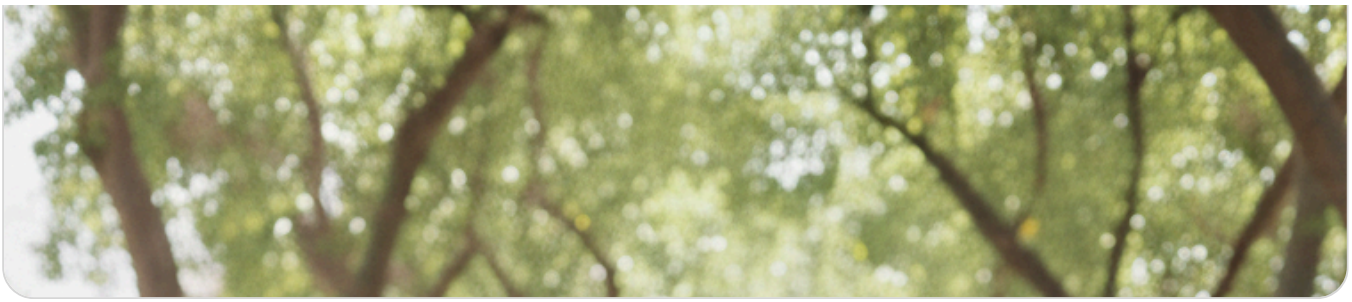
- Where users hesitate
- Where errors occur
- Where support spikes
- Where abandonment happens

Aggressively reduce friction. Simplify without dumbing down.



1 **Sketch, Test**

(Guerrilla Style)



2 Gather Insights

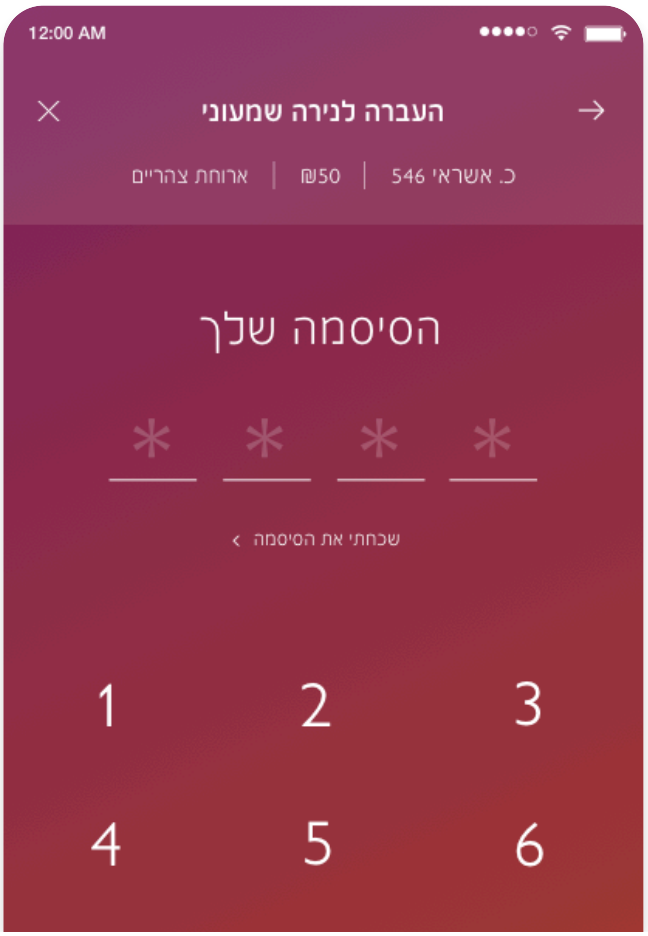
Fix Issues

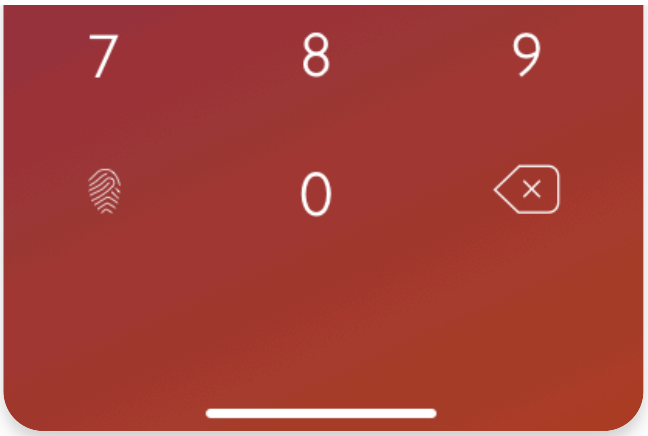
3 Release Version

KEY INSIGHT:

Lean design wasn't a style choice - it was a usability strategy.

This insight became the backbone of the flow.

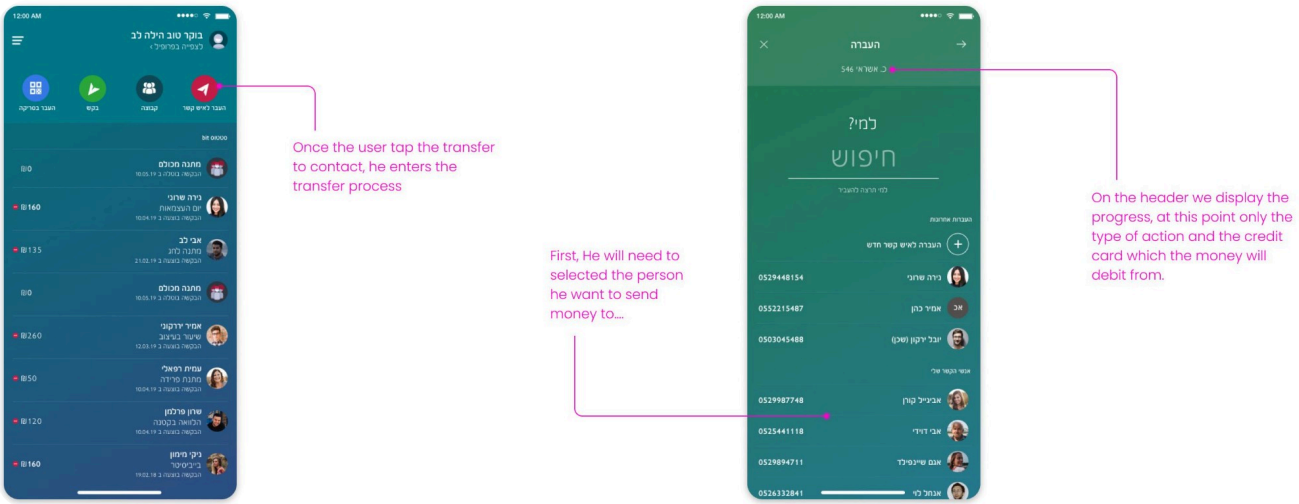


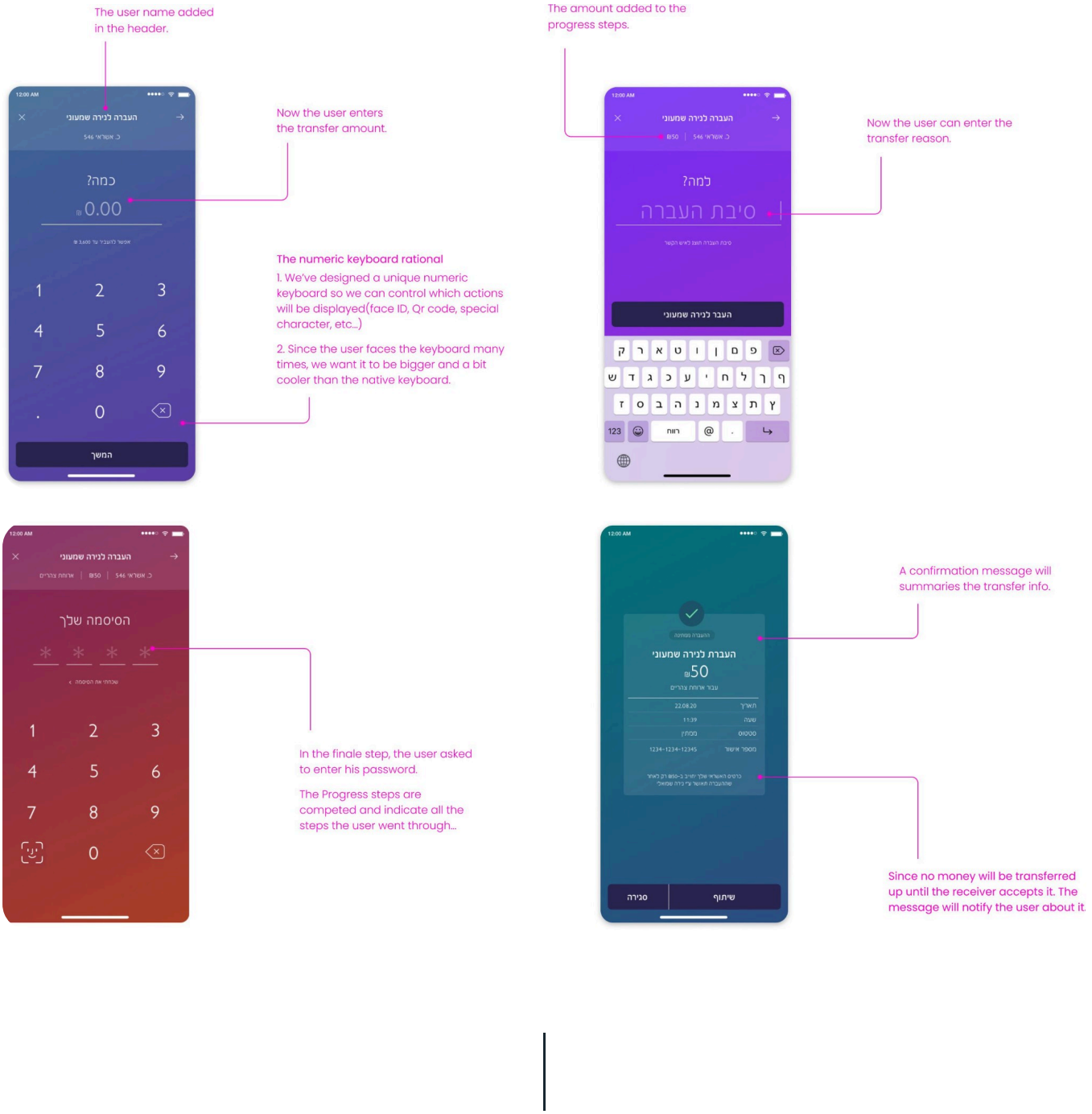


FLOW BREAKDOWN

Intent → Selection

The flow begins with transfer intent, then narrows focus to recipient selection, using progressive disclosure to maintain context and minimize cognitive load.





MICRO-INTERACTIONS

Seamless Motion

Subtle animated transitions guide users through the payment flow, creating a smooth, intuitive experience from start to finish.

RESULTS

Impact at national consumer scale

2M+

users on the #1 tier-2 P2P payment app

Improved activation and repeat usage

Reduced confusion around transaction status

Increased clarity in high-frequency payment actions

More importantly:

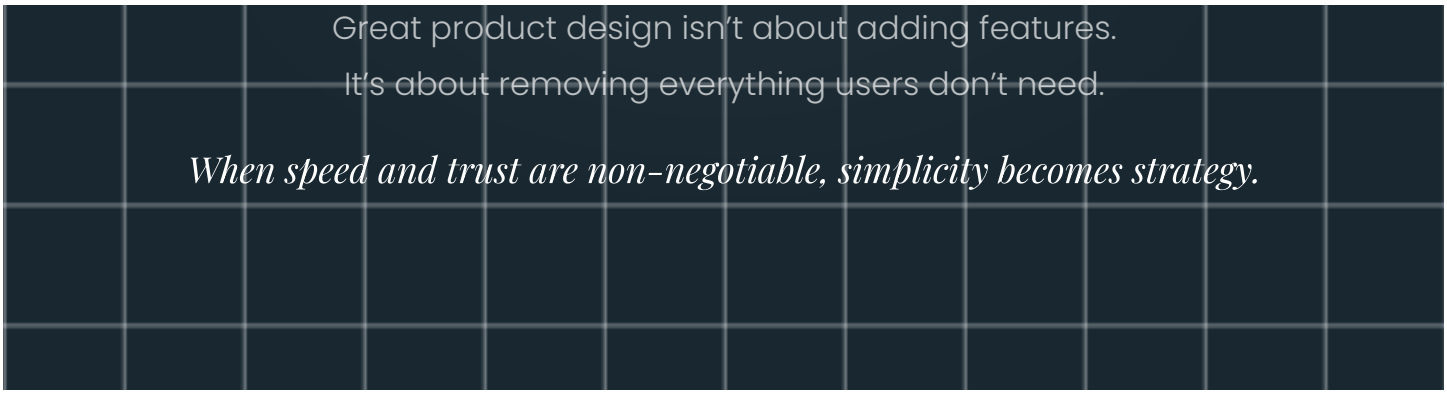
Transfers felt instant. Users stopped double-checking. Trust increased.

OUTCOME

Bit transformed money transfer from:

A stressful financial action

→ A natural, everyday behavior



NEXT CASE STUDY
Bluevine →

BLUEVINE

Driving monetization and activation in SMB fintech

Turning complex financial decisions into confident actions

ROLE

Senior Product Designer

TEAM

PM · Engineering · Data

SCOPE

Registration, onboarding, plan selection, upgrade flows

IMPACT

+7% reg-to-plan conversion · Increased activation · Reduced hesitation

CONTEXT

Small businesses don’t experience banking as a feature set.

They experience it as risk.

Payroll | Suppliers | Inventory | Credit

Every financial action carries weight.

> *“Running payroll, paying suppliers, and managing cash flow felt like guessing.”*

> *“I wasn't looking for loans all the time - I wanted confidence.”*

> *The opportunity wasn’t just monetization.*
> *It was decision confidence.*

THE PROBLEM

SMB users hesitated to upgrade due to unclear value differentiation.

Plans and features blurred together - especially for non-financial users.

- Financial product complexity
- One-size messaging across personas
- High sensitivity around money
- Friction-heavy onboarding

Lack of predictable outcomes

RESEARCH INSIGHTS

Speed equals survival

Uncertainty is more stressful than cost

Business context is missing

Decision confidence is a product feature

Owners want control, not more banking

> *The hesitation wasn't about price.*
> It was about clarity before commitment.

MAIN INSIGHT

Financial users require clarity *before commitment.*

Uncertainty blocks action.

When users clearly understand what will happen next: they move faster, decide better, and rely on the product more.

MONETIZATION DECISION LOGIC EXPERIMENTS

My Ownership

- Led monetization and upgrade flow redesign
- Designed decision-based plan logic
- Partnered with Data for behavioral insights
- Translated SMB usage patterns into guided recommendations
- Operated within an experiment-driven squad
- Extended experience into onboarding and dashboard clarity

THE CHALLENGE

Designing lending and banking for BlueVine meant:

Removing complexity from financially sensitive moments

Replacing uncertainty with clarity, speed, and predictability

How do we make high-risk financial decisions feel controlled and safe?

THE APPROACH

Four connected improvements

01

Simplify Plan Differentiation

Instead of feature-heavy comparisons, we reframed plans around business size, cash flow patterns, credit usage behavior, and growth stage. Plans were translated into business outcomes - not financial jargon.

02

Add Contextual Guidance During Selection

We introduced decision-based logic: plan recommendations tied to user behavior, clear explanation of what changes after upgrade, and transparent benefits and limitations. Financial commitment became predictable - not abstract.

03

Clarify Benefits Tied to Real Behavior

Rather than listing "Advanced analytics" or "Credit flexibility", we showed: faster access to working capital, real-time cash visibility, reduced payment delays, and clear approval expectations.

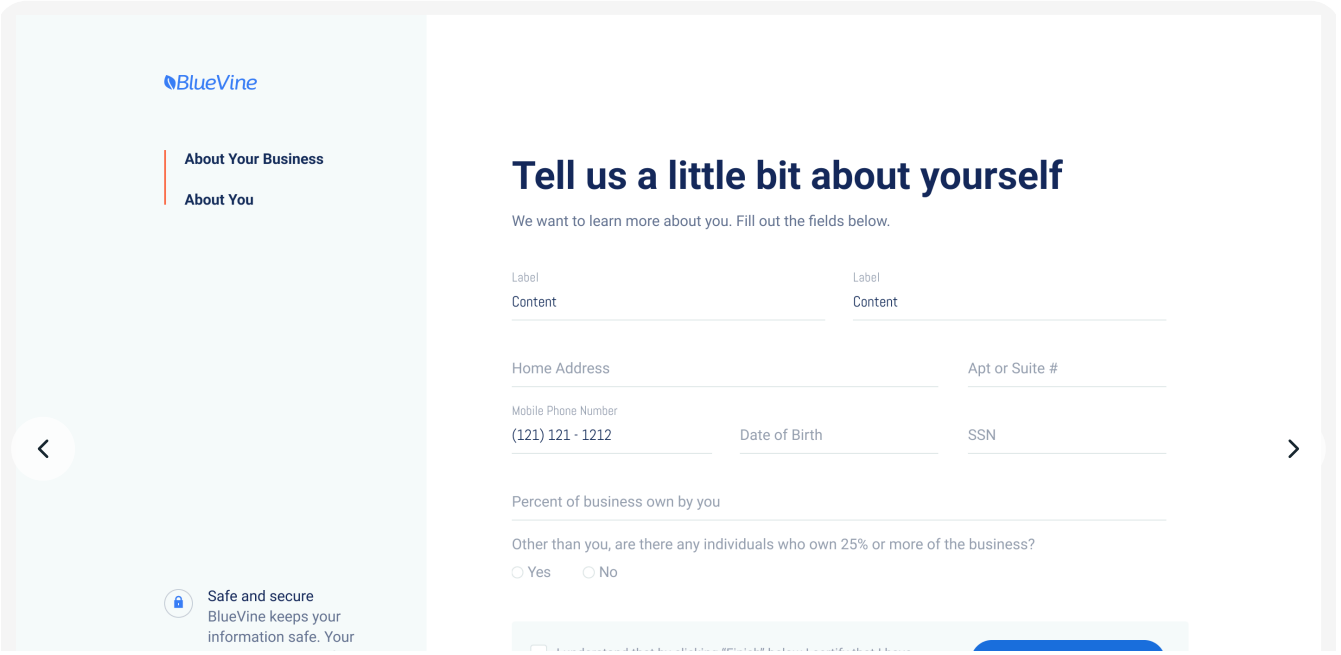
04

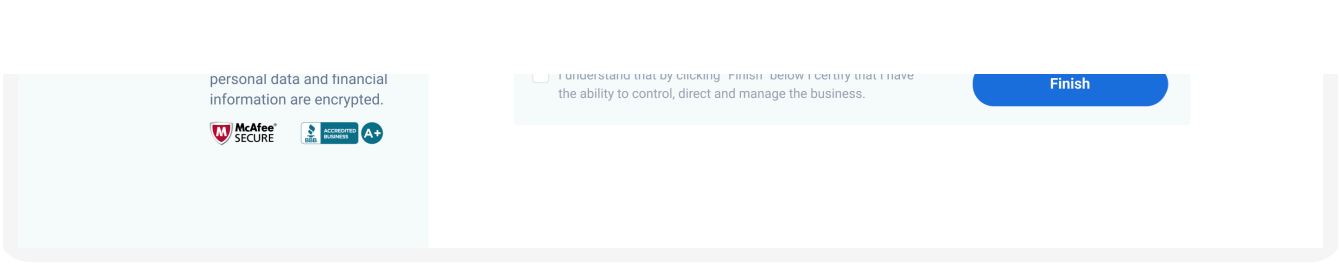
Reduce Onboarding Friction

Financial onboarding often feels heavy and intimidating. We redesigned it to feel step-based and guided, with minimal manual input, transparent status, and fast completion (minutes, not days). Clarity replaced guesswork.

Decision confidence is as important as approval itself.

ONBOARDING JOURNEY



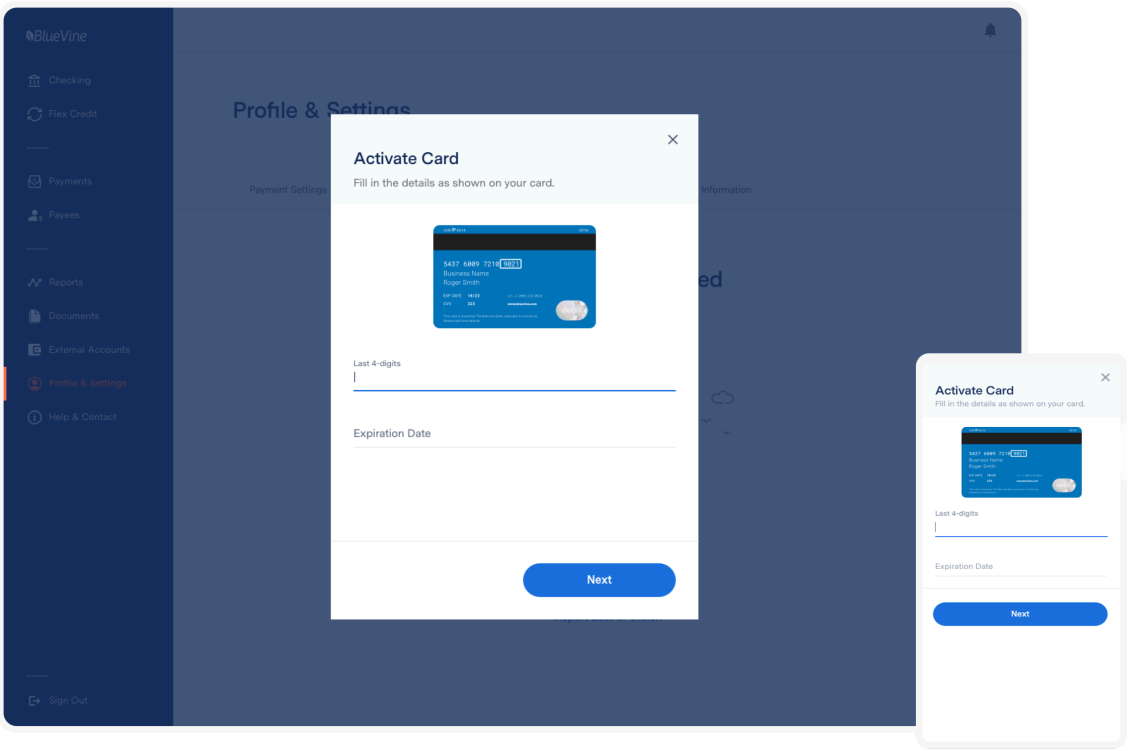


FROM ONBOARDING TO CONTROL

The business's financial command center

Immediate cash visibility | Simple payment flows | Credit access transparency | Real-time analytics | Clear action pathways

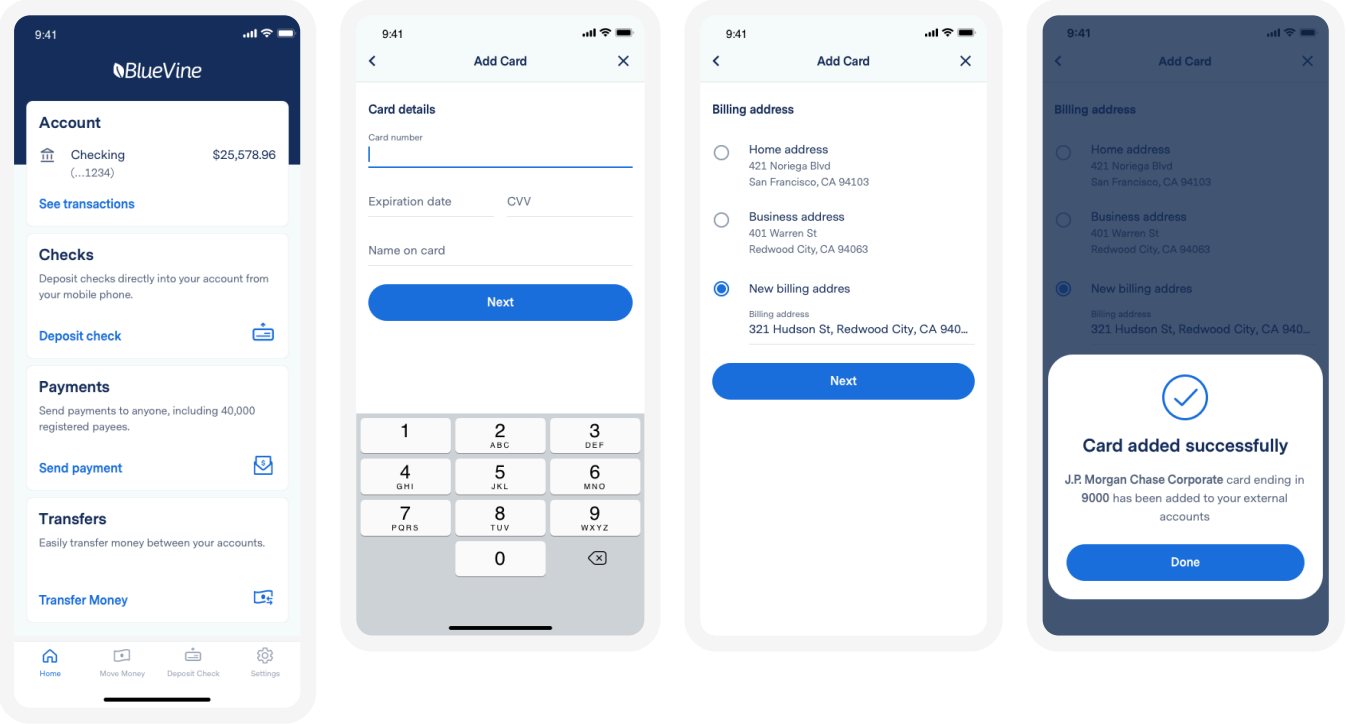
Instead of navigating banking tools, users managed outcomes.

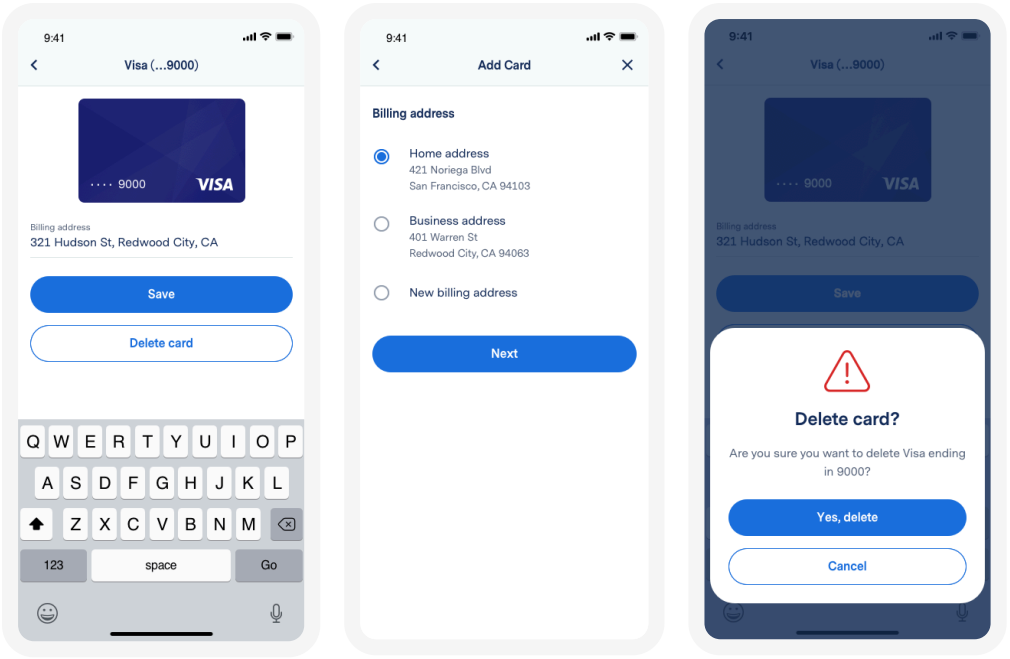


NATIVE EXPERIENCE

Extending Full Control Into a Native Experience

Designing a native mobile app to give business owners full financial control from anywhere. The experience allows users to manage cards, make payments, access credit, and deposit checks through a financial-grade mobile interface - turning banking from a place you go into a tool that moves with your business.





EXPERIMENTATION & VALIDATION

Operating inside a growth squad, we:

- Tested simplified plan messaging
- Validated decision-based logic
- Reduced hesitation points
- Measured upgrade friction

The improved experience drove measurable product adoption and engagement.

RESULTS

Measurable impact on monetization

+7%

improvement in registration-to-plan conversion

Increased product adoption and engagement

Reduced hesitation during plan selection

Improved upgrade clarity

Shift from reactive banking → proactive financial control

> *The product shifted from a functional tool to a daily business essential.*

OUTCOME

BlueVine transformed from:

A financial service

→ A confidence engine for small businesses

When users clearly understand what will happen next,

NEXT CASE STUDY
Xtream IO →

XTREMIO

Designing enterprise storage management systems

When losing context means losing control

ROLE

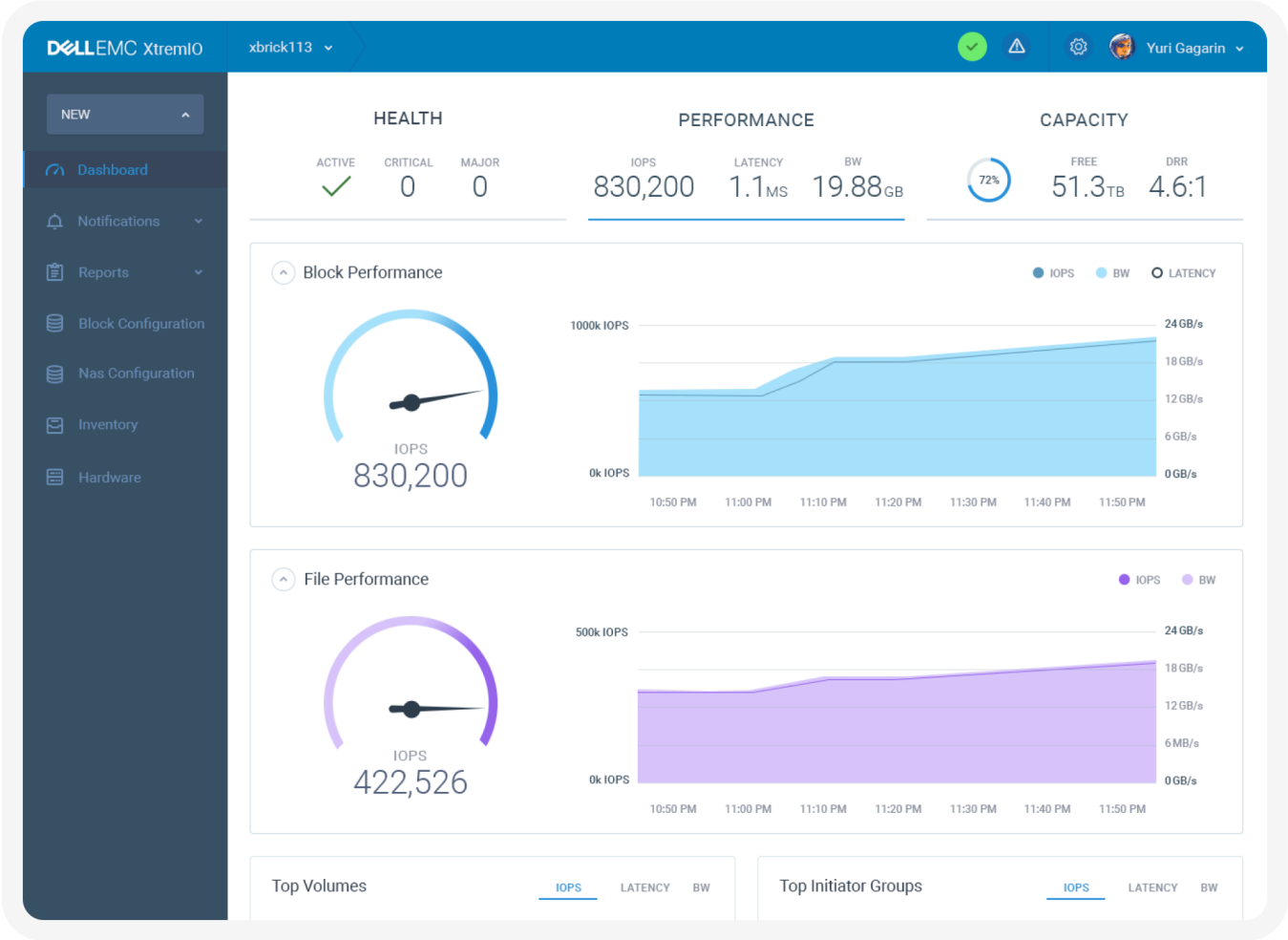
Product Designer

TEAM

PM · Engineering · Enterprise Stakeholders

SCOPE

Storage monitoring · System management · Admin workflows



CONTEXT

XtremIO operates in deeply interconnected enterprise environments.

Systems are complex.
Infrastructure logic is dense.
Small changes cascade.

- Health
- Performance
- Capacity
- Connectivity

Administrators monitor all of these - at once.

> The challenge wasn't showing data.
> *It was keeping users grounded inside complexity.*

THE PROBLEM

- Low tolerance for inefficiency
- High sensitivity to system failures
- Zero room for ambiguity

Backup administrators operate in shifting mental states:

MAINTENANCE STAGE

Calm and proactive

OVERVIEW STAGE

Alert and cautious

CRISIS STAGE

Urgent and overloaded

DURING CRISIS MOMENTS

Time is critical.
Mistakes are costly.
Friction increases stress instantly.

The interface needed to simplify without oversimplifying.

Technical users value clarity and control - not decoration.

OWNERSHIP

My Ownership

- Designed monitoring dashboards and admin workflows
- Translated infrastructure metrics into clear visual hierarchies
- Reduced friction in system management tasks
- Standardized interaction logic across tools
- Collaborated directly with engineering-heavy stakeholders

- Simplified protection setup flows

KEY INSIGHT

Great monitoring UX doesn't simplify systems.

It makes them understandable under pressure.

Efficiency and information hierarchy drive adoption. Decision confidence is a product feature.

DESIGN PRINCIPLES

From ideation insights:

- Show only what's needed, when needed
- Automate the minimum required decisions
- Speak the administrator's language
- Guide, but let users decide
- Keep systems optimistic — not alarming

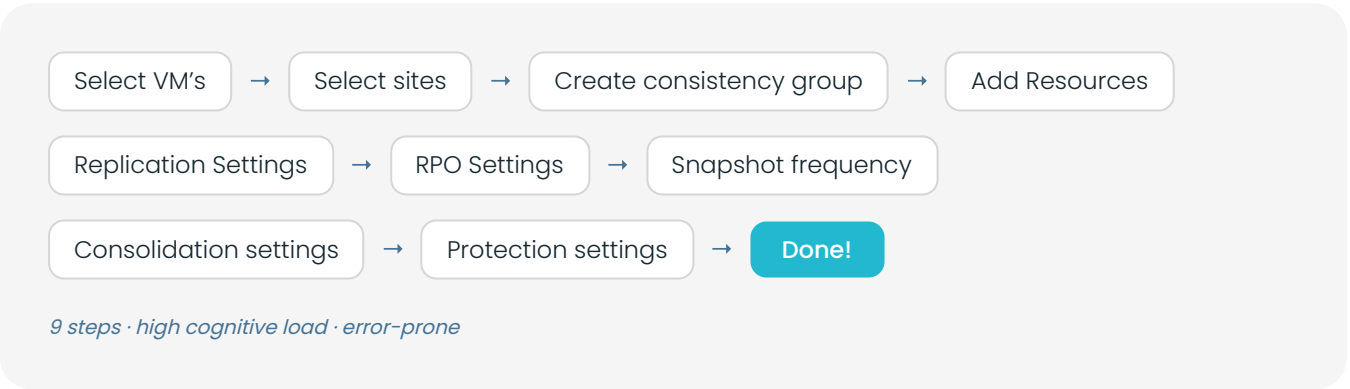
The goal was not visual simplification.

It was cognitive simplification.

From a Complex Setup to a Clear, Guided Flow

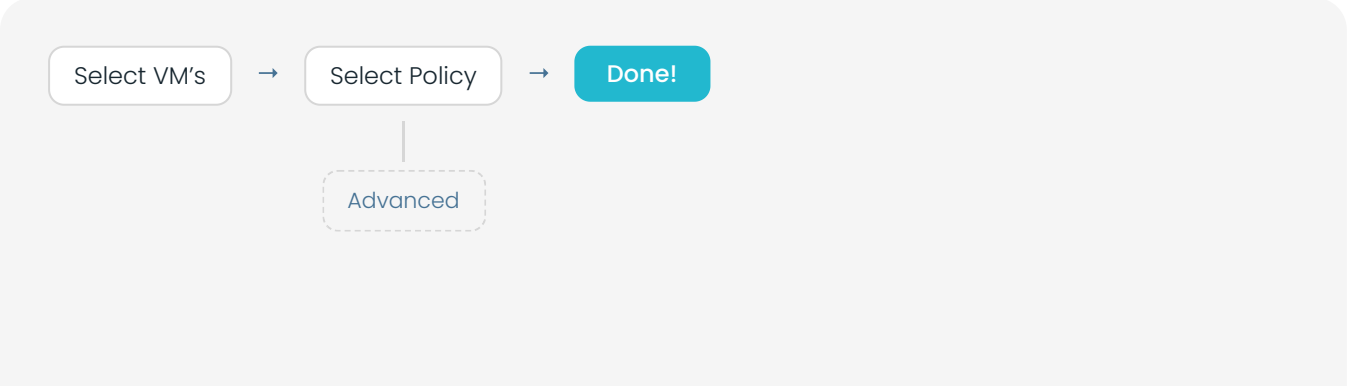
The legacy protection flow required users to move through multiple disconnected steps, forcing them to make low-level technical decisions early in the process. This created a long, error-prone path with high cognitive load, especially for first-time or time-constrained users.

BEFORE



In the redesigned flow, the process is reduced to its core decisions. Users start by selecting the virtual machines, choose an existing policy, and complete the setup in a single, linear path. Advanced configuration is available when needed, without blocking progress.

AFTER



3 steps · clear path · optional depth

The Approach

01

Simplify Data Hierarchy in Dashboards

The dashboard was reorganized into three mega-tabs: Health, Performance, and Capacity. Each tab surfaces critical signals first. High-level indicators appear immediately; deep details are accessible on demand.

- Reduces cognitive load
- Supports faster scanning
- Enables quick escalation decisions

02

Improve Visibility of System Status & Alerts

Cluster connectivity was redesigned into clear visual states: Connected (green, solid), Unknown (neutral, dashed), Disconnected (red, broken), Initializing (active without false alarm). Instead of interpreting logs, administrators understand status instantly.

03

Reduce Steps in Frequent Admin Actions

The legacy protection flow forced low-level configuration decisions too early. The redesigned flow starts with selecting virtual machines, applies existing policy, and completes setup in a linear path. Advanced configuration surfaces only when needed.

- Setup time reduced
- Errors minimized
- Confidence increased

04

Preserve Context with Master-Detail Views

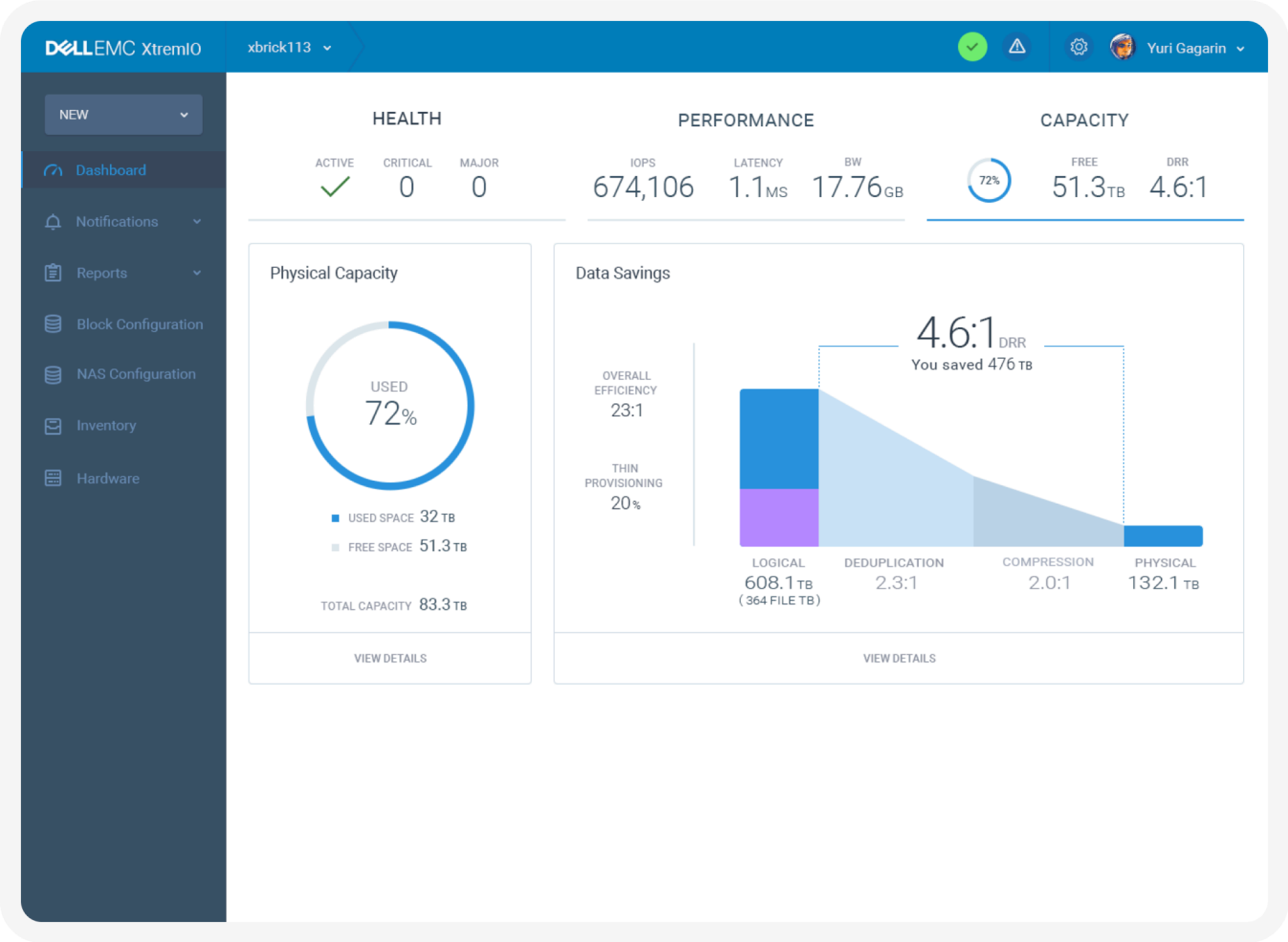
We introduced a master-detail interaction pattern: the overview remains visible while selecting an item reveals a detailed side panel. Monitoring → investigation without navigation loss. This preserves orientation - critical in enterprise environments.

Losing context means losing control.

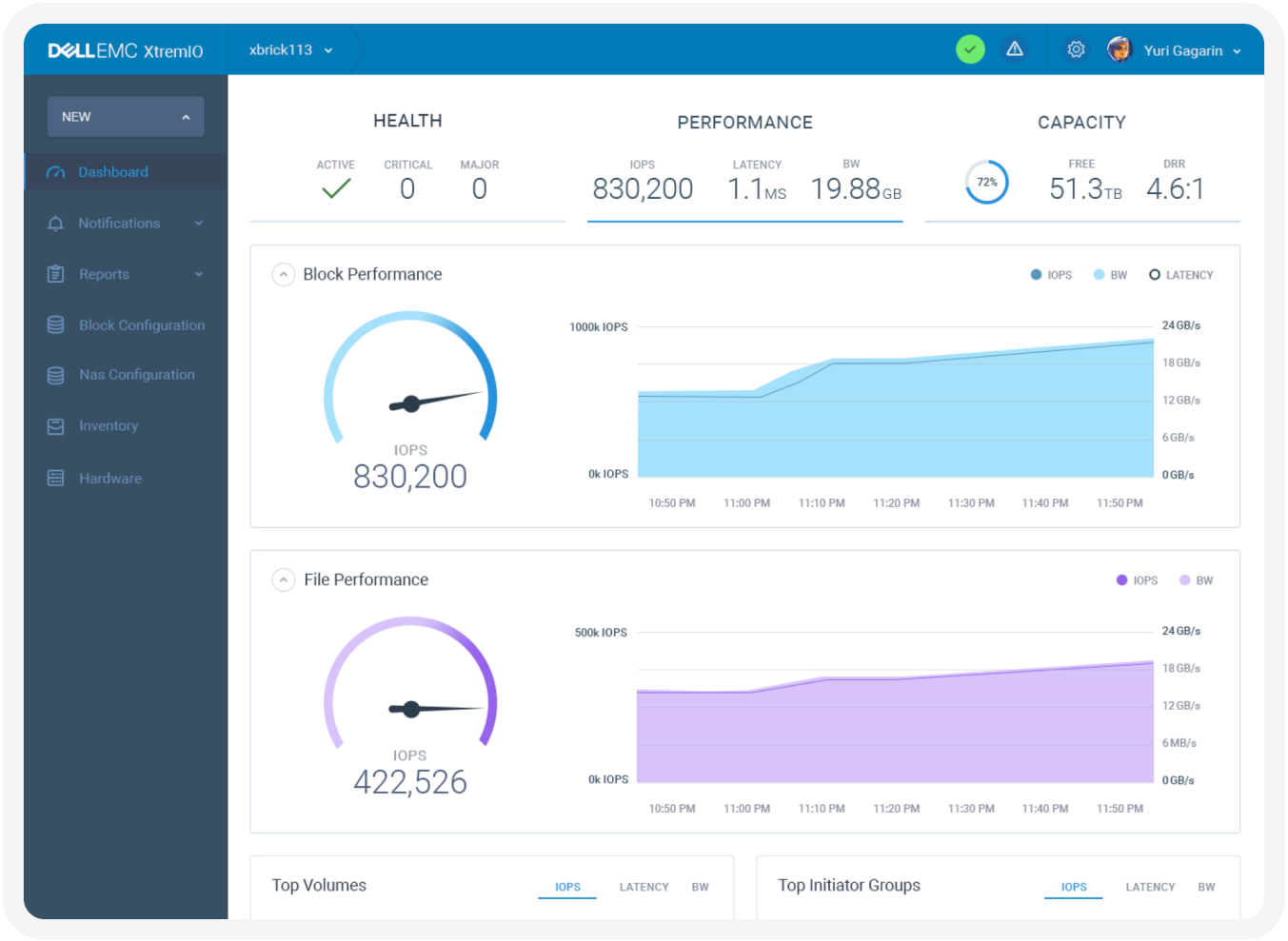
DESIGN OUTPUT

Dashboard Overview with Mega Tabs (Health / Performance / Capacity) - Information at the Right Level

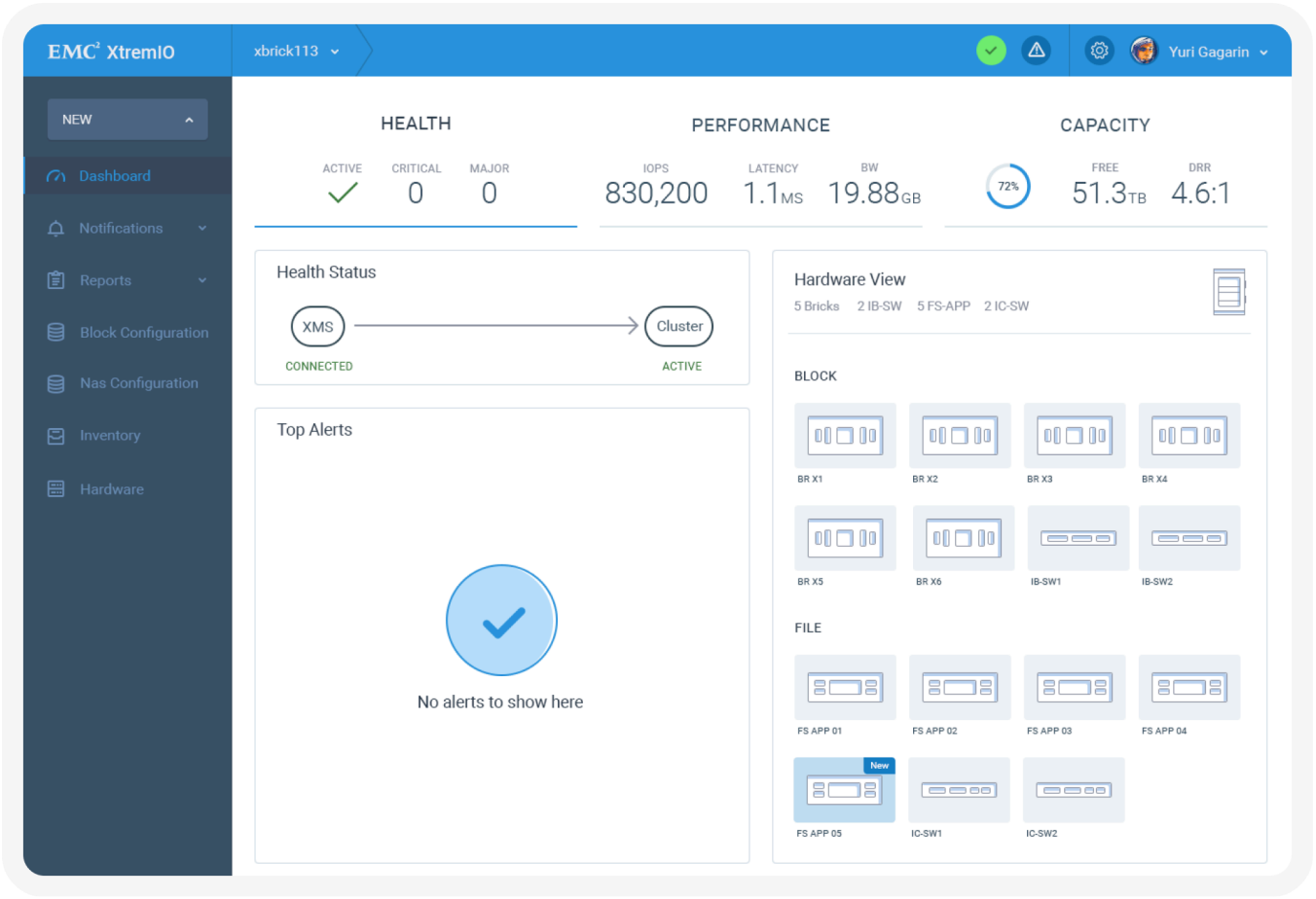
The dashboard is organized around three high-level mega tabs: Health, Performance, and Capacity. Each tab surfaces the most critical information for that domain, allowing administrators to quickly understand system status without digging through multiple screens.



This structure reduces cognitive load by grouping related metrics into a single, focused view. Instead of scanning scattered data points, users can assess system health, performance trends, or capacity risks at a glance and then drill down only when needed.



By presenting high-level signals first and detailed insights second, the mega tabs support fast decision-making during routine monitoring and high-pressure situations alike - helping backup administrators stay in control and act with confidence.



Cluster Connectivity - Clear Status at a Glance

The cluster connectivity component provides an immediate, visual understanding of the relationship between the XMS and the cluster. By using consistent icons, colors, and connection lines, administrators can instantly identify the current state without interpreting logs or alerts.

Connected

Both systems are communicating normally. The solid connection line and green indicators confirm that the cluster is healthy and fully operational.

Disconnected

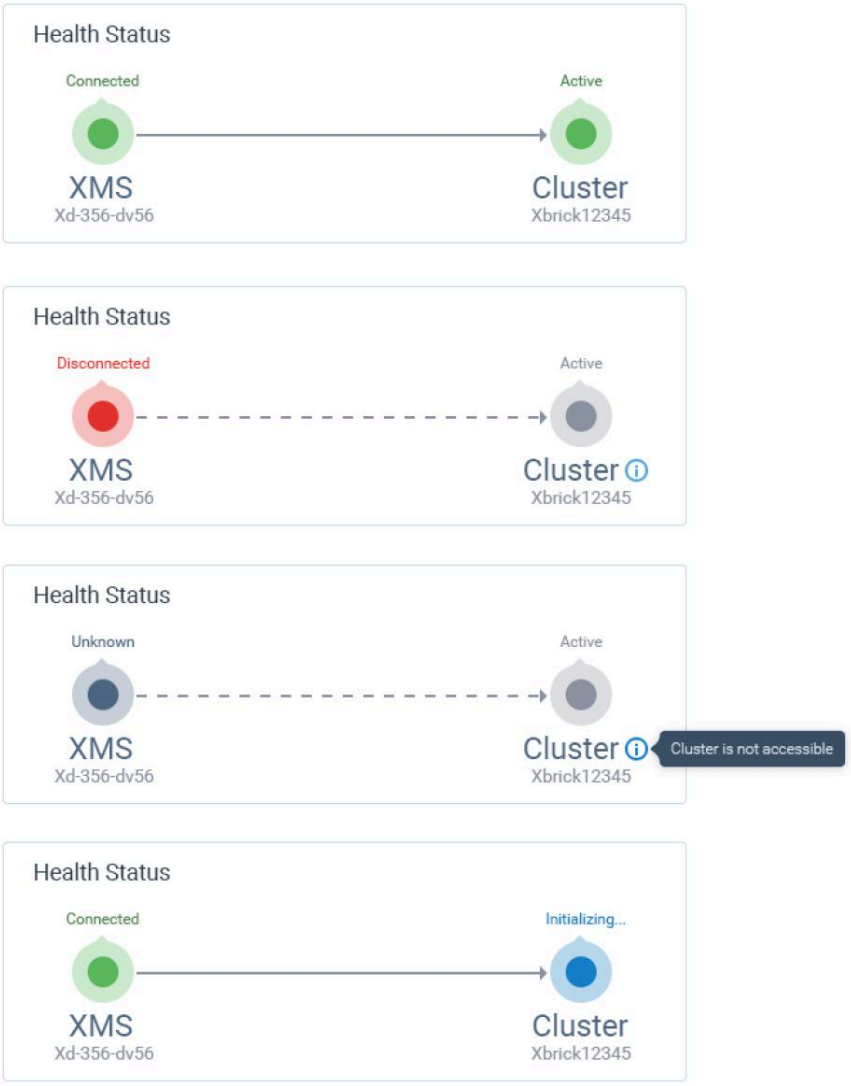
Communication between the XMS and the cluster is interrupted. The broken connection line and red indicator clearly signal an issue that requires attention.

Unknown

The system cannot determine the cluster's status. Neutral colors and a dashed connection indicate uncertainty, while contextual hints provide guidance without creating false alarms.

Initializing

The cluster is in the process of establishing a connection. The active state is visually communicated without triggering unnecessary concern.



This approach reduces ambiguity during monitoring and crisis moments, allowing backup administrators to quickly understand what's happening, why it matters, and when action is required.

Master-Detail View - From Overview to Action

The Data Protection overview provides a high-level snapshot of system health, compliance, and active sessions. Selecting an item in the topology instantly reveals detailed information in the side panel, allowing administrators to move from monitoring to investigation without leaving the page.

This master-detail approach keeps the main context visible while surfacing relevant details on demand - reducing navigation, preserving orientation, and enabling faster, more confident decision-making.

Impact

This is how fund operations should feel: clear, visible, and grounded.

- Faster scanning
- Safer decision-making
- Reduced operational risk

RESULTS

Measurable impact on enterprise operations

TASK EFFICIENCY

Improved task efficiency for system administrators

MONITORING

Reduced friction in monitoring workflows

DECISION SPEED

Faster scanning and safer decision-making

CONSISTENCY

More consistent enterprise UI patterns across tools

OPERATIONAL RISK

Reduced operational risk

OUTCOME

XtremIO transformed from:

Dense infrastructure dashboards

→ Grounded system awareness

Great monitoring UX doesn't simplify systems.
It makes them understandable under pressure.

Designing awareness in systems that never stop, when losing context means losing control.

NEXT CASE STUDY

FundGuard →