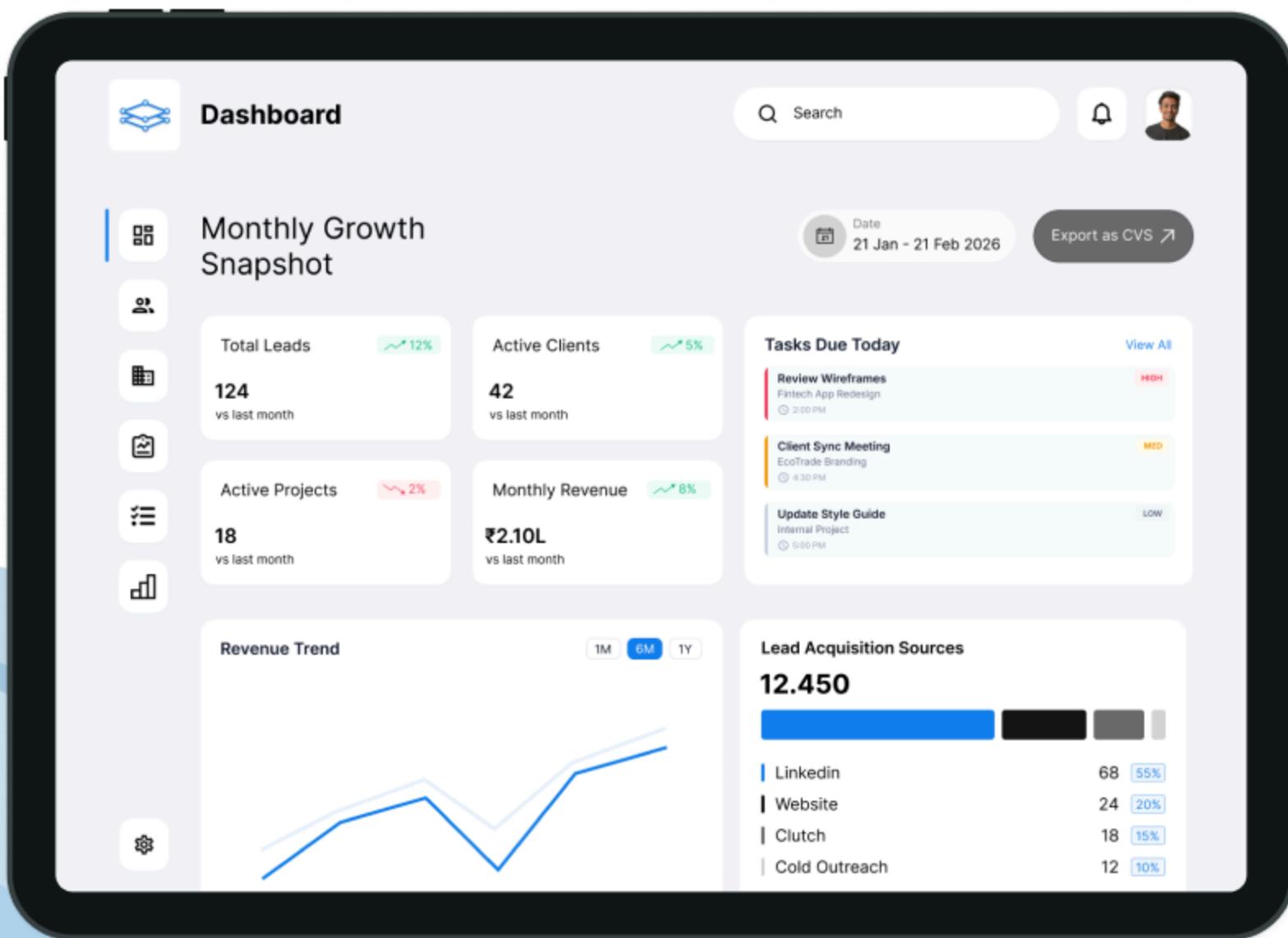


Designing the Operating System for a Growing UI/UX Agency

A CRM System built for Interface Labs to manage leads, clients, projects, and revenue.



Business Visibility

Track revenue, deals & growth



Structured Client Management

Multiple projects, financial tracking

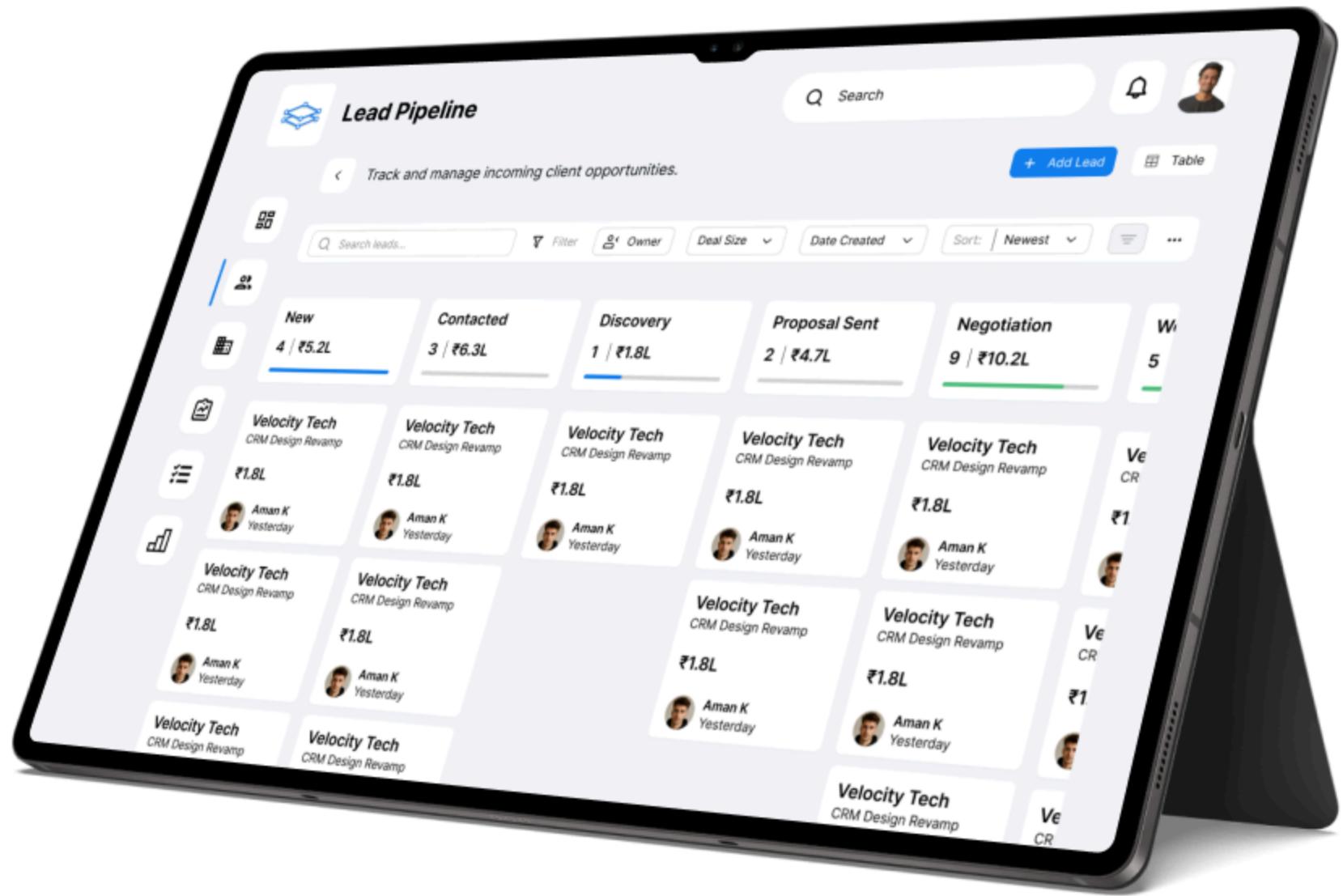


Task & Follow-up Control

Never miss deadlines

Lead Pipeline

Structured Deal Tracking



Dual View: Kanban + Table

Structured deal tracking for different workflows

Stage-wise Value Overview

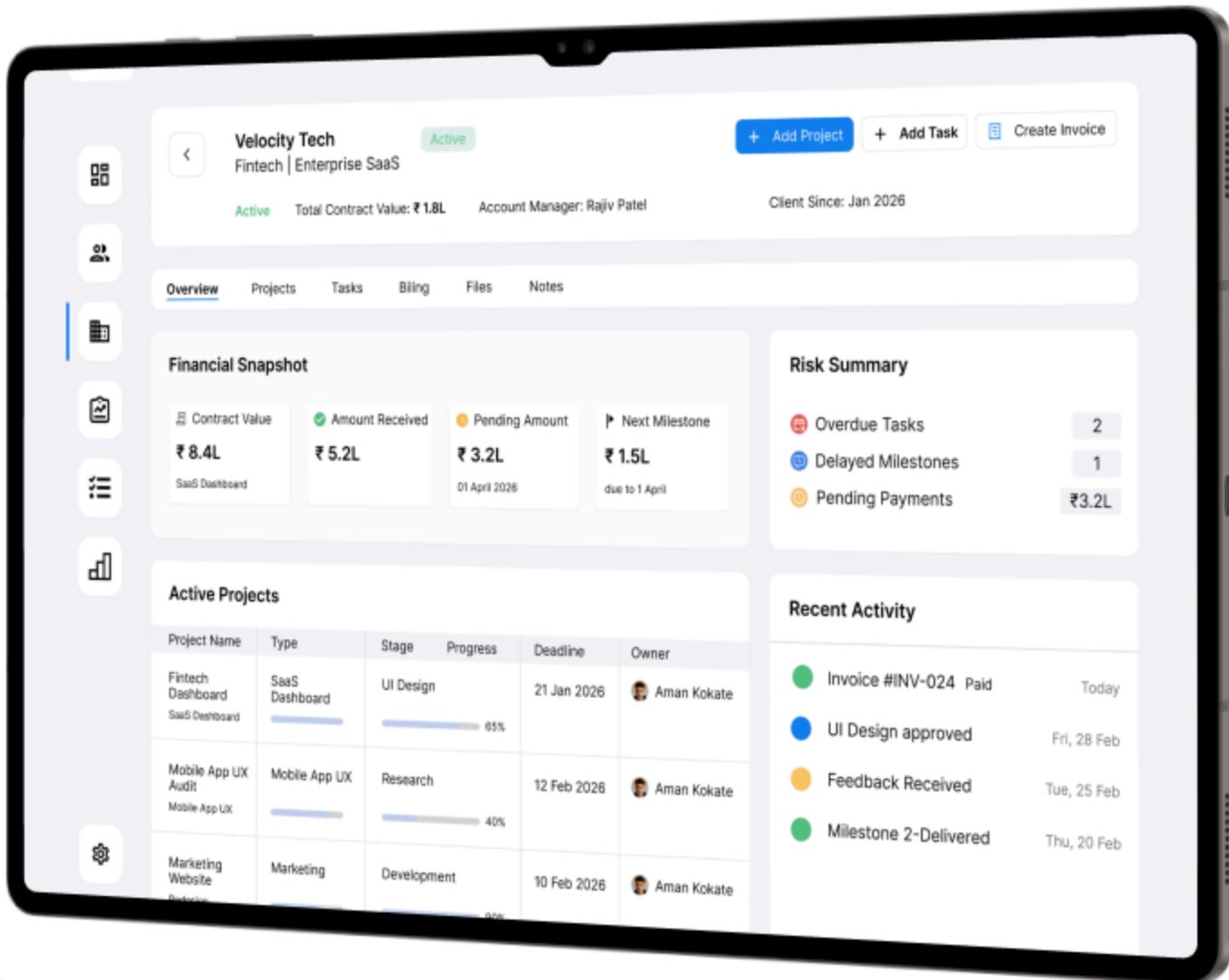
Every stage's value clearly shown

Track and manage incoming client opportunities with clarity across every stage.

Client Intelligence Dashboard

Centralized Control Across Projects, Revenue & Risk

A unified command view designed to manage client performance, financial exposure, and delivery progress in real time.



Financial Oversight

Full view of contract value, revenue, payments, and milestones.

Risk Monitoring

Immediate awareness of overdue tasks, delayed milestones, and financial gaps.

Project Governance

Track active initiatives by stage, progress, ownership, and deadlines.

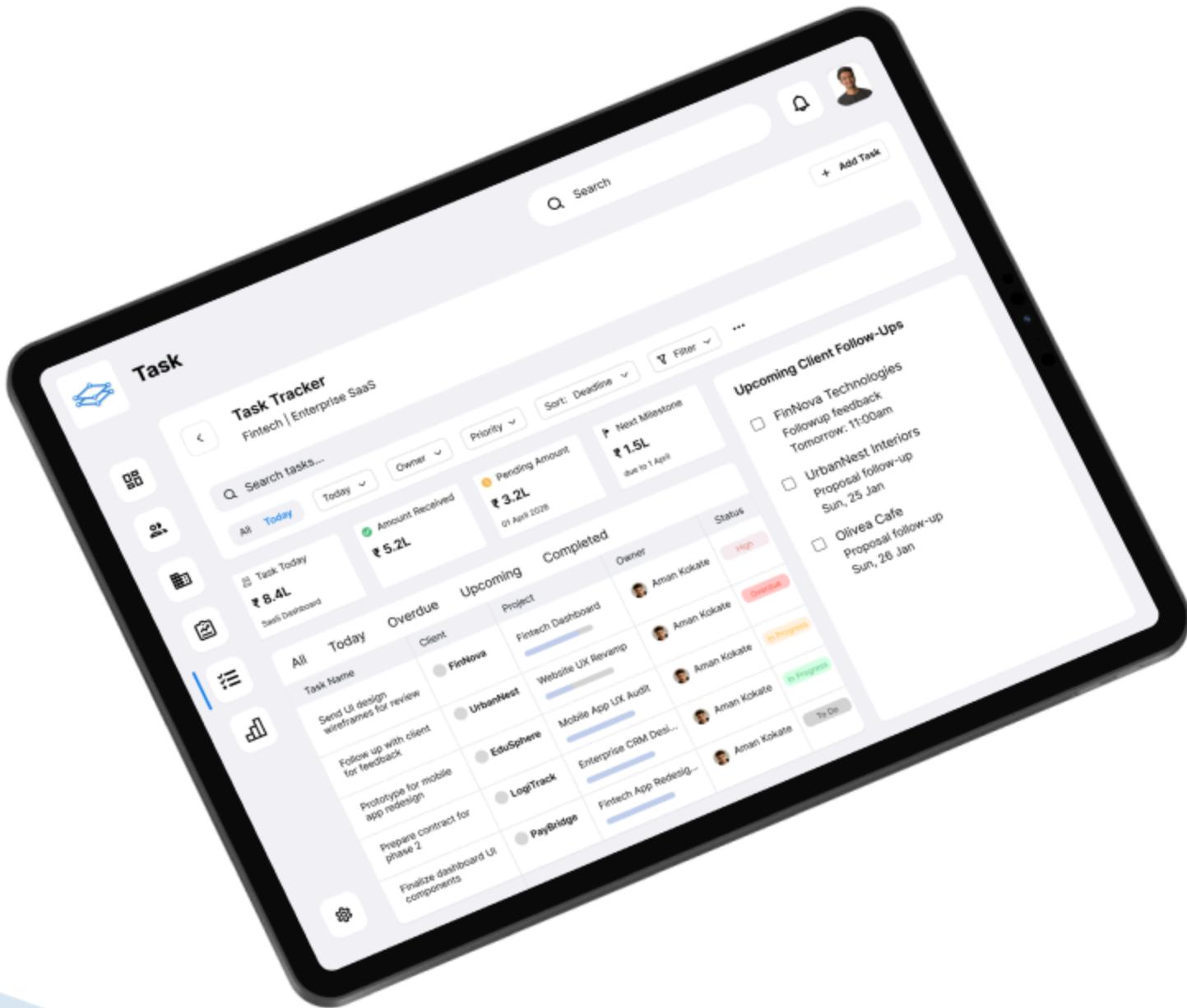
Operational Timeline

A real-time activity stream covering invoices, approvals, and delivery updates.

Operational Task Control

Execution Visibility Across Clients & Projects

A structured task system designed to prevent delays, manage priorities, and maintain delivery discipline.



Priority-Based Execution

Categorized task states: Today, Overdue, Upcoming, Completed.

Client-Linked Accountability

Every task mapped to client, project, and owner.

Follow-Up Intelligence

Dedicated tracking for proposal and client follow-ups.

Status Transparency

Clear indicators for high priority, overdue, and in-progress tasks.

Designing Systems, Not Just Screens

Execution Visibility Across Clients & Projects

A structured CRM built to support growth, visibility, and operational clarity for a modern UI/UX agency.

Business Visibility

Operational
Discipline

Scalable
Structure

Key Learnings

- B2B systems demand clarity over decoration.
- Information density must remain scannable.
- Strong hierarchy reduces cognitive overload.
- System thinking drives product maturity.

Appreciate you scrolling through the full case.