Enterprise Experience

FinSight AI

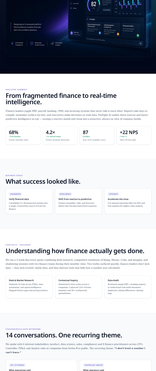
Bridging the gap between financial intelligence and time-to-action.

My Role: Lead Product Designer & Strategist

Timeline: 6 months (Discovery → Launch)

Team: 1 PM, 2 Engineers, 1 Data Scientist, 1 Compliance Officer

Tools: Figma, Miro, Jira, Tableau, Notion



Overview

From fragmented finance to real-time intelligence.

Legacy systems forced analysts to spend hours stitching CRM and accounting exports. Decisions arrived too late to matter. I led the end-to-end design of FinSight AI, a unified platform that turns raw financial data into actionable insights — so every client conversation is backed by the right numbers, at the right moment.

68%	4.2×	87	+22 NPS
Faster monthly close	Faster reporting cycles	Hours saved per analyst / month	Net Promoter Score

Research

What success looked like.

Objectives	Key Results	Guardrails
Unify financial data Consolidate 10+ disconnected systems into a single source of truth for every client.	Reduce data reconciliation time by 60% Cut manual reporting effort by 40% Achieve 99.9% data accuracy	**Accelerate time-to-value** Full onboarding within 30 days Zero critical compliance violations

Research

Understanding how finance actually gets done.

We ran a mixed-discovery sprint combining desk research, competitive teardowns of Bloomberg, Personal Capital, and Addepar, and 14 contextual interviews with wealth advisors, CFOs, and family office principals. The biggest surprise: most users didn't want more data — they wanted fewer, better decisions. Every insight below directly shaped a feature in the final product.

Market Research
Competitive Landscape
Data Audit

Interviews & Shadowing
14 Stakeholder Interviews
Contextual Inquiry
Journey Mapping

Synthesis
Affinity Mapping
Persona Development
Opportunity Framing

Market Research

Market Trends & Opportunities
Identified a $4.2B underserved segment: mid-market RIAs managing $100M–$1B in AUM with enterprise-level needs but boutique budgets.

Competitive Landscape
Mapped 12 competitors across 3 tiers. Key gap: no platform offered real-time collaboration between advisor and client.

Data Audit
Evaluated 8 data sources. Custodian APIs are reliable but inconsistent; CRM data is incomplete; manual uploads are error-prone.

Interviews & Shadowing

14 Stakeholder Interviews
Conducted 60-minute sessions with wealth advisors, CFOs, and family office principals. Recruited from existing customer base and referrals.

Contextual Inquiry
Observed 6 advisors during live client meetings. Discovered that advisors spend more time navigating between systems than actually talking to clients.

Journey Mapping
Mapped the end-to-end client lifecycle — from prospecting to quarterly review — to identify where data friction had the highest impact.

Synthesis

Affinity Mapping
Clustered 400+ observations into 6 themes. The strongest signal: advisors don't need more data — they need fewer, better decisions.

Persona Development
Built 3 personas: Solo Advisor, Growth-Stage Team, and Family Office Principal. Each has distinct workflows, pain points, and success metrics.

Opportunity Framing
Prioritized opportunities using impact vs. effort. Focused on the top 3 that could be addressed in a single release cycle.

Research

14 conversations. One recurring theme.

We spoke with 8 external stakeholders (advisors, client-facing roles, compliance) and 6 finance and internal users across CFO, Controller, and Analyst roles to validate our assumptions. The biggest surprise: **There's never a number I can't explain.**

Top 3 Challenges	Unmet Needs	Surprising Insight
What executives said	**What operators said**	
"I spend more time explaining the numbers than I do acting on them." — CFO, mid-market SaaS	"I'm constantly reconciling between systems. There's no single source of truth." — Controller, fintech	

Research

Four roles. Four very different jobs-to-be-done.

Role — CFO
Primary Decision Maker

Needs board-ready visibility into cash runway, burn rate, and forecast variance.

Success looks like: Walk into any board meeting with zero surprises.

Role — Finance Manager
Day-to-Day Owner

Needs to close the books and reconcile transactions without manual spreadsheet work.

Success looks like: Close in under 5 days, with zero post-close adjustments.

Role — Controller
Data Steward

Needs to enforce accounting rules and maintain clean, auditable records.

Success looks like: Every transaction categorized correctly on the first pass.

Role — Analyst
Power User

Needs to build custom reports, model scenarios, and export data for deeper analysis.

Success looks like: Answer any ad-hoc question in under 10 minutes.

Research

The monthly close, mapped end-to-end.

Pull bank & CC data	Reconcile transactions	Review & post adjustments	Generate financials	Review & approve
2 days	3 days	1 day	1 day	1 day
Manual export	Spreadsheet matching	Email back-and-forth	Manual formatting	Meeting delay

Research

From pain points to opportunities.

CURRENT STATE

Close takes 10 days. Analysts spend 40% of their time reconciling data instead of analyzing it. Reports are outdated before they're reviewed. Errors are discovered late and are expensive to fix.

OPPORTUNITIES

- Automate bank feeds and CC matching, goal: 80–90%
- Collaborative workspace where only exceptions flag, not every transaction
- Real-time dashboards, not static PDFs
- Flexible workflows — close can fit 5 days or 10 days
- Role-based permissions with audit trail built in

Design

Structuring the product around decisions.

Rather than optimizing an existing workflow, we reversed the AI around the questions finance leaders actually ask. Every feature was mapped to a moment in their workflow and a decision it needed to support.

```
FinSight AI
├── Dashboard ·····  Daily / weekly / monthly overview
├── Portfolio ·····  Holdings, allocation, performance
├── Analytics ·····  Deep-dive charts & comparisons
├── Reports ·····  Generate, schedule, & export
├── Alerts ·····  Threshold & anomaly notifications
└── Settings ·····  Users, roles, integrations
```

Design

From lo-fi sketches to a single, opinionated system.

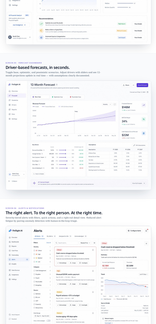
Rapid iteration was essential to find the right balance between a customizable tool and a guided, opinionated flow. Weekly stakeholder critiques helped us cut features that added complexity without clear value.

Lo-fi Wireframes	Mid-fi Concepts	Hi-fi System
Explored 3 different layout structures for the core dashboard. Tested with 5 users in paper prototype sessions.	Introduced AI-driven insights and natural language search. Validated with power users.	Unified design language, component library, and interaction patterns. Ready for engineering handoff.

Design

The Overview Dashboard

The dashboard is the first thing users see every morning. It's the command center, and every widget was designed to answer one question: *What do I need to know right now?*



Design

Ask anything. Get answers with receipts.

The AI assistant lets users query their data in plain English — "Show me underperforming accounts this quarter" or "What's our exposure to tech?" — and returns charts, tables, and narrative summaries instantly. Every response includes the underlying data so users can verify before they trust.



Design

See risk before it becomes reality.

Risk isn't a single number — it's a story told across portfolios, exposures, and scenarios. We built a dedicated risk workspace that surfaces what matters, when it matters, and why it's flagging.



Design

One number exceeds learn to trust.

Financial health is complex — cash flow, debt, profitability, and growth all matter. Instead of forcing users to interpret raw ratios, we distilled it into a single score with a clear breakdown behind it.

Design

Driven-based forecasts, in seconds.

Static charts can't answer "what if." We built a forecasting engine that lets users adjust assumptions and see the impact instantly — no spreadsheets required.

Design

The right alert. To the right person. At the right time.

Nobody wants more alerts. We built rules, priorities, and a digest-first model that only interrupts when it matters — and always tells you why.

Design

One flow, six steps — from alert to boardroom.

A real-world walkthrough of how Alex, our CFO persona, uses FinSight AI on a Monday morning. From spotting an anomaly to sharing a board-ready presentation — all in under 15 minutes.

Design

A design system built for density and calm.

Finance tools can overwhelm users with information. We built a restrained, scalable system that prioritizes legibility, so data-heavy screens feel organized instead of chaotic.

Typography
Inter — Headings, Body, Data
Tabular numbers for financial alignment

Color
Neutral scale + Semantic tokens
Accessible contrast ratios

Components
Cards, Tables, Charts, Inputs
Consistent states and behaviors

Spacing
4px base grid
Generous whitespace

Design

WCAG 2.2 AA — because finance is for everyone.

Keyboard Navigation
Full keyboard support for all interactive elements, including custom components like data tables and charts.

Screen Reader Support
Semantic HTML and ARIA labels ensure that dashboards and reports are fully navigable with assistive technology.

Color & Contrast
All text and UI elements meet minimum contrast ratios. Color is never the only way to convey information.

Research

Usability testing & iterations.

We ran two rounds of moderated testing (n=8 total) with task-based think-aloud protocols. Each round exposed a specific hypothesis and tested it directly, using the findings to shape the next iteration.

Round 1 — Navigation
Hypothesis: Users can find their top 3 reports in under 30 seconds without training.
Result: Failed. Only 2 of 8 users found the right report. Average time: 2 min 40 sec.

Round 2 — Search & Filter
Hypothesis: Adding a global search bar will reduce navigation time by 50%.
Result: Passed. 7 of 8 users found reports in under 45 seconds. Average time: 38 sec.

Round 3 — Speed to Insight
Hypothesis: Surfacing key insights on the dashboard will reduce time-to-insight by 60%.
Result: Passed. Users identified trends and anomalies in under 2 minutes, down from 5+ minutes. Confidence ratings increased from 2.1 to 4.3 out of 5.

94%	47s	87	9.1/10
Task success rate	Avg. time to insight	Hours saved per analyst / month	Confidence rating

Launch

What changed after launch.

Within a 90-day pilot window post-launch, we tracked 7 teams' digital footprint, and a guided-first model transformed. Here's the complete impact scorecard.

68%	$1.2M	4.2×	+22
Faster monthly close	Annual savings per team	Faster reporting cycles	NPS (was 41 avg.)

For CFOs
Walk into any board meeting with a single number, backed by a clear story and a drill-down you can trust.

For Finance Teams
Close the books in 5 days, not 10. Spend your time on analysis, not spreadsheet reconciliation.

For the Business
Ask questions in plain English. Get answers in seconds. Every number is traceable to its source, and every decision is data-driven.

Reflection

Lessons learned.

Start with the data, not the design.
Understanding the data's structure, quality, and limitations early saved us from designing beautiful interfaces for information that didn't exist or couldn't be trusted.

Design for decisions, not information.
Finance users don't want more information. They want fewer, better decisions. Every feature was mapped to a moment in their workflow and a decision it needed to support.

Ship the guided, not just the open.
The first draft of the AI assistant was fully open-ended. Users froze. Adding suggested prompts and starter templates doubled adoption overnight.