How Koru Transformed A Product So Complex

Users Needed An Onboarding "University"

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Imagine standing at the base of a towering cliff, looking up and thinking, "How are we ever going to climb this?"

That's exactly how it felt when our client brought us on board. They're a workload automation company trusted by Fortune 500 giants like Apple and Coca-Cola.

> **The challenge was clear: their product was powerful but overwhelmingly complex, built by engineers for engineers.** It was a maze of tables, schemas, and dropdowns. Logical? Yes. Functional? Sure. But for newcomers and non-technical executives, it was simply too much to grasp. And that was the real issue.

As impressive as the platform's capabilities were, the complexity made it tough to sell and even harder to onboard. Before potential users could unlock the immense value of the system, the sales and customer success teams had to convince skeptical non-technical enterprise buyers to sign on.

Between hefty enterprise licenses, significant organizational inertia and extended speed-to-value period, execs were noticeably gun-shy.

Picture a high-stakes sales demo. Instead of wowing the room, the team found themselves wrestling with forms with hundreds of fields dispersed over dozens of tabs, convoluted menus, and a laundry list of job statuses. Prospects were tuning out before they ever saw the platform's true potential.

The client turned to us to reimagine the entire user experience. That's when we found ourselves at the bottom of that cliff, staring up at the sheer complexity. Sometimes, the only way forward is to clip in and take that first step.
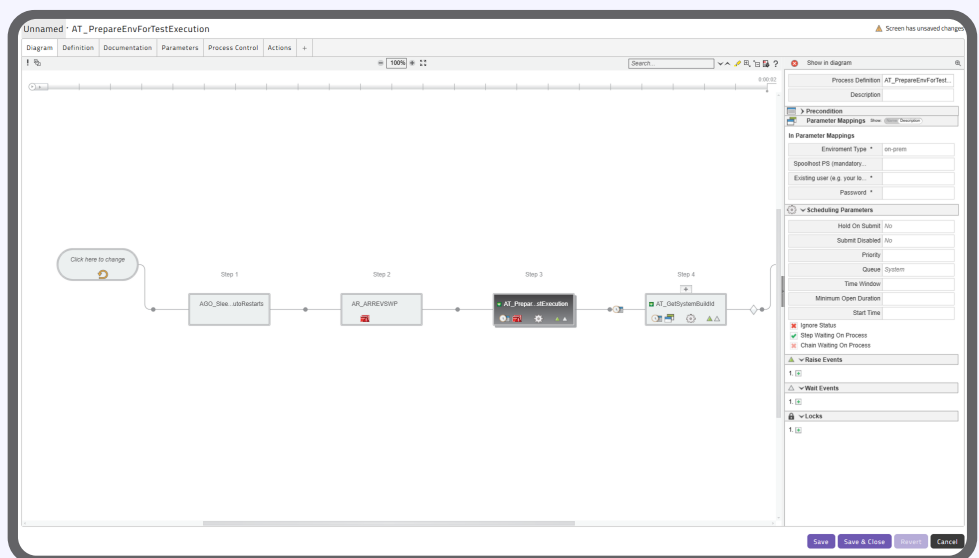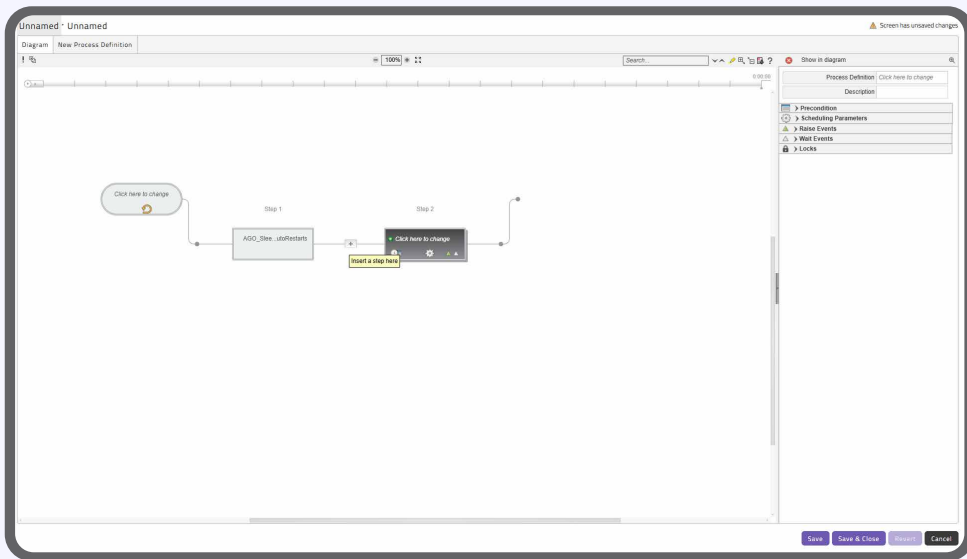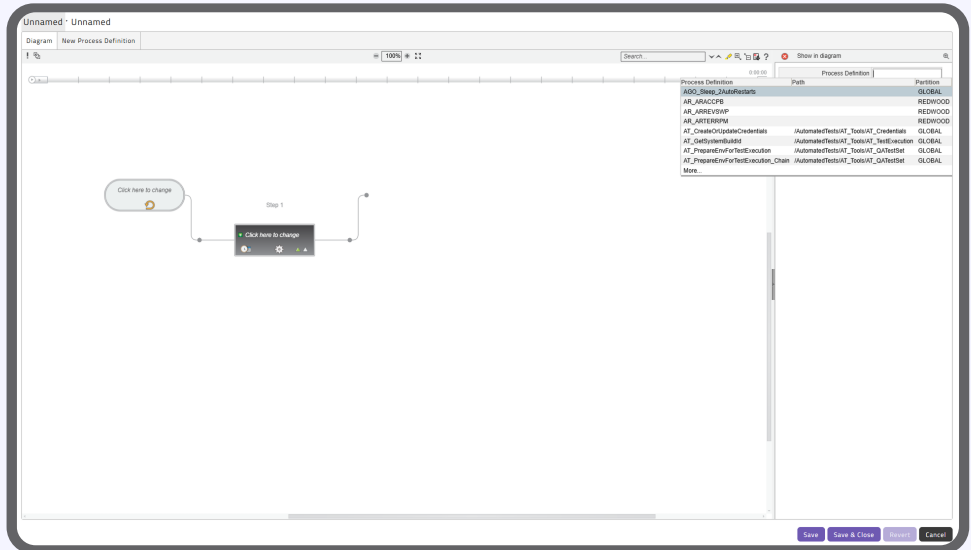
Initial Screens

The Challenge: Achieving Speed-to-Value

This wasn't just a UX challenge – it was a challenge of speed-to-value.

The product was undeniably powerful, but its complexity meant new users had to invest significant time and effort before they could see meaningful returns. Without a simplified, intuitive interface, it was hard to quickly show value, attract new customers, and streamline onboarding.

Think of it like a rocket ship. You can't rebuild a rocket overnight. First, you need to understand the engineering behind it... every valve, gauge, and thruster... before you even think about opening the toolbox.

Our solution? Becoming a fully embedded UX team.

In practice that meant we didn't just offer a few quick fixes and walk away. We worked directly alongside their engineers, product managers, and professional services teams. We collaborated with their sales team to understand pain points and demo challenges. Together, we set shared OKRs, tackled sprint goals, and even shared in the late nights.

This wasn't a typical consultancy, it was true, integrated collaboration focused on delivering value as swiftly as possible.

Demonstrating Value with a UI Refresh

To begin, we focused on updating the client's existing interface with a modern, clean aesthetic. Over the course of five sprints, we completed a straightforward design refresh - purely aesthetic - giving the product a more contemporary look and feel.

Beyond improving visual appeal, these initial five sprints allowed us to become more familiar with the product, team and workflows. Approaching the product in this way laid a solid foundation of trust and understanding, positioning us to tackle more substantial challenges. It also helped build the consensus within their organization that deeper change was required, and reskinning was just the first step. **This helped shift perspectives that design is not a "one and done" project, but an ongoing habit.**

Diving into Complexity

Next it was time to roll up sleeves and get to the heart of the problem.

The product was vast - so vast that they had a nine-month onboarding "university" for users. There were operators monitoring automations, developers building them, administrators overseeing infrastructure, and business unit heads tracking KPIs. Each user group had unique needs and mental models.

The navigation alone spanned hundreds of links across multiple levels. SLA dashboards - a critical feature for prospects - were so convoluted they were ignored by many users. And when an automation ran, it could generate 33 different job statuses, each requiring a manual to interpret. Even with the documentation, many users struggled to understand what to do next!

> **How did we untangle this? By going deep.** We immersed ourselves in the product's history, logic, and user pain points. We interviewed stakeholders, shadowed professional services teams, and combed through legacy decisions to understand why the product was the way it was.

But here's the twist: the client didn't want to change the underlying architecture. The product's core logic had to remain intact. Our job was to redesign the experience within these constraints. No small feat!

Getting a Bird's Eye View of the Product

Our team began with a comprehensive exploration phase.

We conducted in-depth interviews with users across a range of expertise: non-technical users, casual users, and power users. This provided a nuanced understanding of how different personas interacted with the system and revealed specific pain points in configuring workflows.

User Interviews:
We held focused sessions with stakeholders, learning about their frustrations and workflows. This uncovered insights like the time-consuming nature of setting up workflows and the need for a more intuitive interface to support frequent tweaks and tests.

Task Analysis:
Observing administrators at work gave the team a granular view of common tasks, from creating automation workflows to troubleshooting issues. These observations pinpointed opportunities to streamline processes and reduce errors.

Affinity Mapping:
Data from interviews, heuristic evaluations, and task analysis was synthesized into themes. Patterns of user frustration - information architecture that didn't match their mental model, the lack of guidance in the UI and the cognitive load of navigating complex flowcharts - emerged as key design challenges.

Prioritizing Sales Sticking Points

To cut through the complexity, we started with a single question: **"What matters most to sales?"**

Why sales? Because the product's first impression happened during demos. And it was costing them opportunities.

If we could make the demo intuitive and compelling, they'd not only win over prospects but also set the stage for easier onboarding.

Existing users and power users were less of a concern since they had already learned the software. The goal was to improve the experience for all users eventually, but initially, we focussed on the users where the pain of adoption was most significant.

We reimagined the navigation, flattening the hierarchy into just a few core areas, which significantly improved key user metrics like task completion time and demo effectiveness. These changes resonated deeply with both new users and stakeholders, demonstrating the practical benefits of streamlined design for complex workflows.
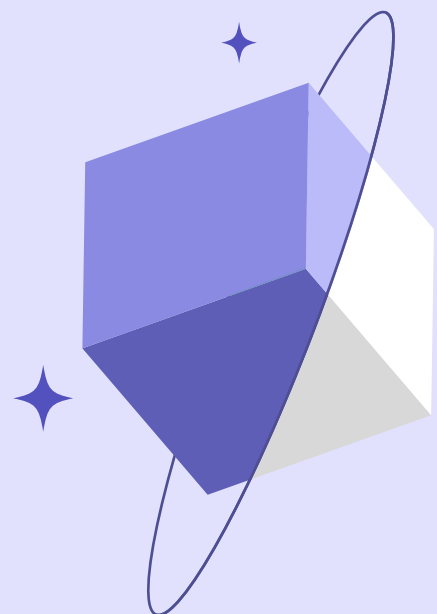
We overhauled the SLA dashboard, embedding it into the main monitoring view so users could see SLA risks at a glance. And we introduced themes, like "compact" and "comfortable," to cater to different working styles.

> **The guiding principle: Does it resonate with the mental model of our target personas?**

Prototype, Test, Iterate

Now comes the exciting part, prototyping. We didn't just sketch concepts in isolation. We tested ideas constantly, both with internal stakeholders and external users.

Prototypes became tools for sparking conversation. Engineers would poke holes in designs. Professional services teams would flag missing edge cases. Sales teams would suggest narrative tweaks for demos.

## Balancing Legacy and Innovation

Here's where the nuance really shines. While we were pushing for change, we had to respect the needs of legacy users. Some customers had been using the product for years and didn't want to switch. To ease the transition, **we ensured feature parity between the old and new versions.** Beta users could toggle between interfaces, and existing workflows were preserved.

But we didn't stop there. We tackled some of the most complex features – like the "studio," where users built automations with up to 2,000 jobs. We rethought how these automations were visualized, reducing noise and highlighting critical information.

> **This wasn't just a redesign, it was a reimagining.**

Redesigned Screens
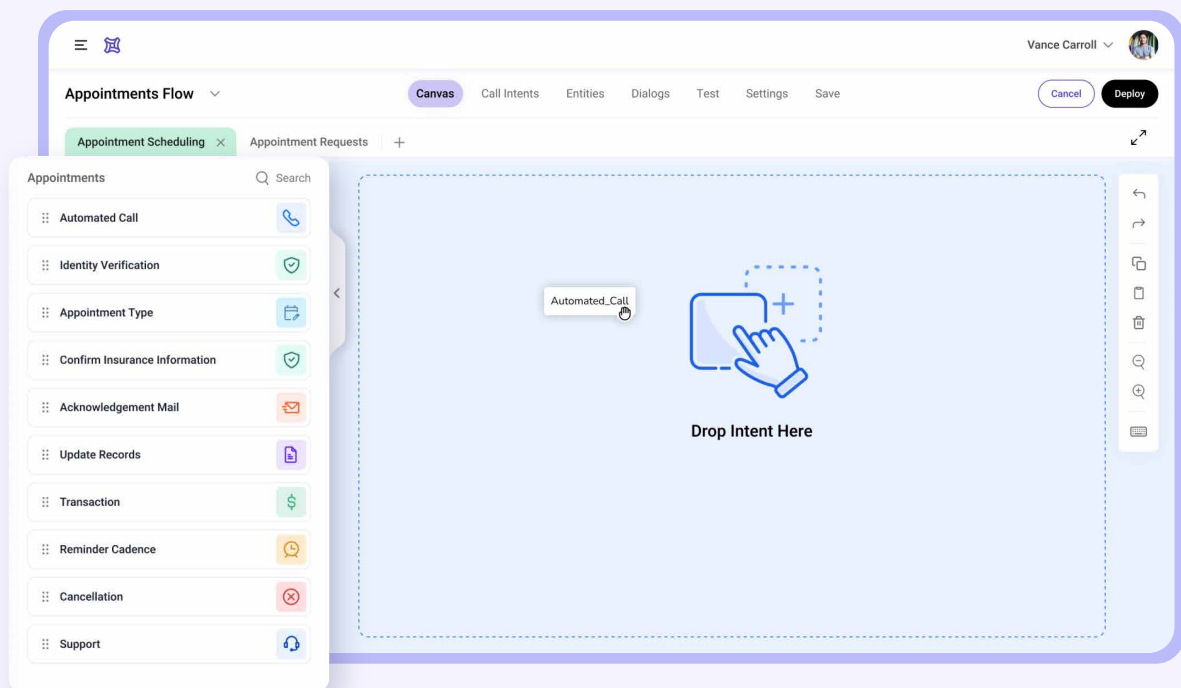
Building a new IVR automation is simple and efficient, with all actions listed in the left panel.
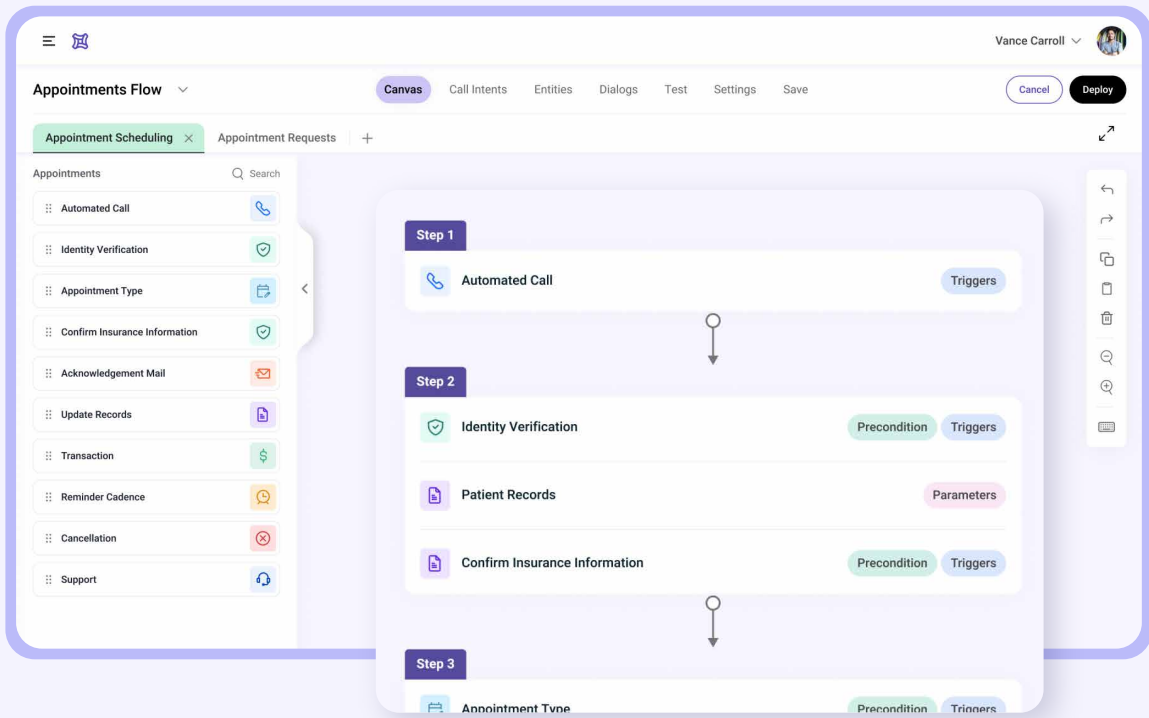
The vertical workflow makes it easy to scroll through and edit.

The clean, clutter-free interface ensures that the focus remains on the primary actions.

Grooming for Development

Grooming played a pivotal role in ensuring that the design translated seamlessly into development. We collaborated closely with dev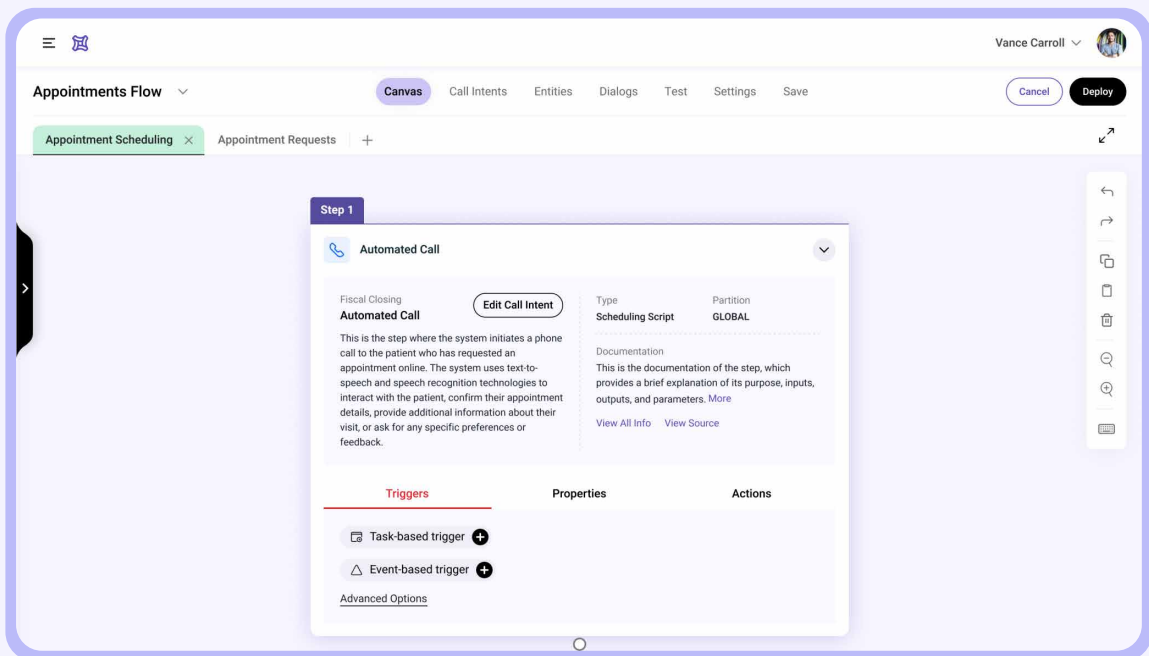elopers to estimate the complexity of user stories and align on priorities based on the release plan. **We provided detailed prototypes, covering all use cases and edge cases,** along with comprehensive design and functional specifications.

We also scoped several large initiatives that were ultimately broken into several phases. This helped us reduce the complexity, resource the projects effectively, and manage the change for internal stakeholders and users.

During development, designers remained deeply involved, addressing developer queries, refining specifications as needed, and conducting rigorous QA to ensure that the implemented designs matched the intended vision. This included pixel-perfect comparisons and iterative adjustments based on feedback from sprint demos.

Results and the Road Ahead

Within 9 months, the beta was live. Fifty users had already started exploring the new interface. **Sales teams reported more confidence in demos, translating into tangible benefits like improved conversion rates and shorter sales cycles.** These results showcased the power of a streamlined and intuitive design to create compelling first impressions during product demonstrations. The time-to-value metric - a critical KPI - was improving. And while it was still early, the foundation was set for long-term success.

Thoughtful UX = Real Impact

Fixing complexity isn't about moving fast. It's about listening deeply.

Every element in the client's platform existed for a reason. Instead of rushing in with assumptions, we took the time to understand why. We worked alongside engineers, sales teams, and longtime users to respect what worked, simplify what didn't, and iron out friction without disrupting power users.

Slow is smooth, and smooth is fast. By focusing on clarity, adoption, and the moments that mattered most, we helped the client create a product that was still every bit as powerful, only a lot easier for users to wrap their head around.

Bansi Mehta

Founder & CEO, Koru UX Design

Bansi Mehta is the Founder-CEO of Koru UX Design. A UX practitioner with over a decade of experience, she specializes in design ops and innovation discovery at the business level. She has led interdisciplinary teams to revamp B2B SaaS and legacy products in the HealthTech sector, curating superior, user-centric experiences.

About Koru UX Design

At Koru UX Design, we help growth-oriented HealthTech companies to meet ambitious product roadmaps.

With over a decade of experience in solving complex UX challenges for HealthTech companies from startups to enterprises, we provide designs that are simple and streamlined to deploy.

Our niche expertise in HealthTech has enabled us to deeply understand the industry's intricacies and collaborate as an extension of your in-house team.

Our work portfolio covers a wide range of HealthTech solutions for EHRs, Pharmacy Management, Patient Portals, Lab Information Systems, Telemedicine Apps, Revenue Cycle Management, Patient Engagement, Home Health Solutions, and more.

We've been recognized globally for our HealthTech UX expertise, bagging top design awards for innovation and excellence of craft, including 6 iF Design Awards, an A'Design Award, and a UXDA nomination.

Let's talk about how we can help you build a world-class UX team for smarter, more efficient product cycles.

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USA

18 South, 2nd Street
San Jose, California 95113

INDIA

6/8, Kumar City, Kalyaninagar,
Pune 411014

KORU