

# Customer Intelligence & Analytics

Turning complex customer data into clearer context, insight and action.



## ROLE

UX / UI Designer

## FOCUS

IA · Dashboards · Data Viz · Workflows · Prototyping

Production UI is omitted due to confidentiality. Visuals in this case study are abstracted to explain the design work.

# One customer view across a data-heavy enterprise product.

A B2B customer intelligence experience focused on helping users understand context, relationships and what matters next.

## PRODUCT CONTEXT

The broader platform connected enterprise data, customer insights, analytics and technology in one ecosystem.

This case study focuses on the Customer Intelligence experience: creating a clearer way to understand a customer, their relationships, activity and surrounding data.

## MY CONTRIBUTION

I worked across information architecture, dashboards, data visualization, workflows, interaction design, visual design and prototyping.

## ROLE

UX / UI Designer

## TEAM

BA · Product · Engineering ·  
Business stakeholders

## PRODUCT TYPE

B2B enterprise data +  
customer intelligence

## CONSTRAINT

Production UI withheld;  
structures and visual models  
used instead

## The product connected data, customers and analytics - the UX challenge was making that complexity understandable.

Public product positioning describes four connected capability areas; my case study focuses on the customer intelligence experience inside that ecosystem.

### DATA

Enterprise data across platforms, tables, feeds and transformations

### CUSTOMER

Customer 360, identities, relationships, behavior and preferences

### ANALYTICS

Insights that help users understand patterns and make decisions

### TECHNOLOGY

Ways to connect and publish information across business systems

### DESIGN INTENT

**Turn complex data into customer understanding.**

Source note: current public product positioning was used only to clarify product context; the UX contribution described here is based on the supplied case-study material.

# Complex information was difficult to consume.

Enterprise users needed depth, but the experience still had to feel structured, readable and actionable.

## ENTERPRISE USERS NEEDED TO

- Understand customer information quickly
- Navigate large datasets
- Identify important metrics
- Monitor operational information
- Move between related capabilities

## THE EXPERIENCE ALSO NEEDED

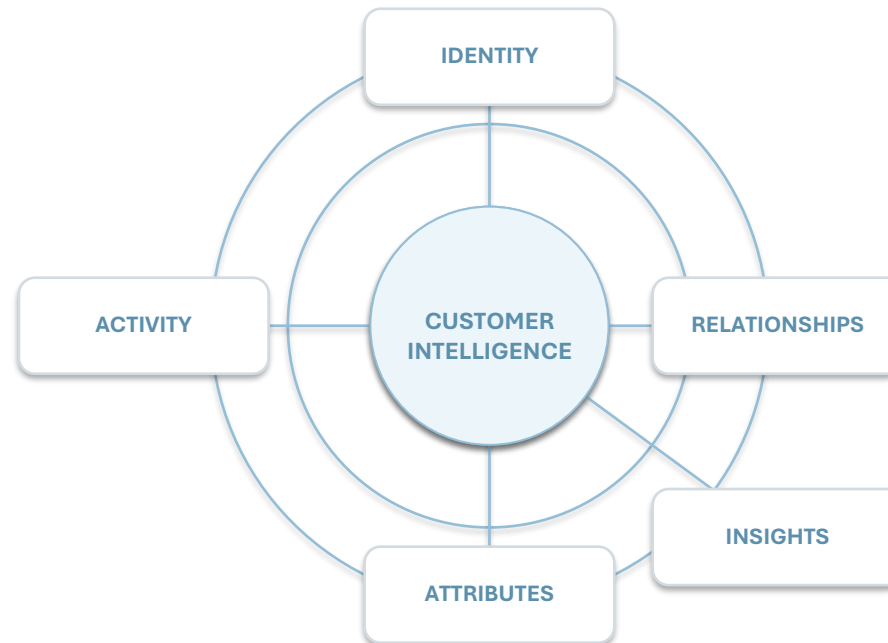
- A connected customer view
- A useful way to explore relationships
- Visual patterns that support comparison
- Clear next steps after investigation

## DESIGN QUESTION

**How do we turn complex information into experiences people can understand and act on?**

# Bring the customer into focus.

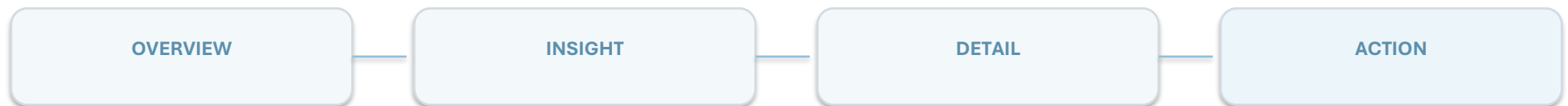
The goal was not simply to display data, but to help users build a more complete understanding of the customer.



## EXPERIENCE PRINCIPLE

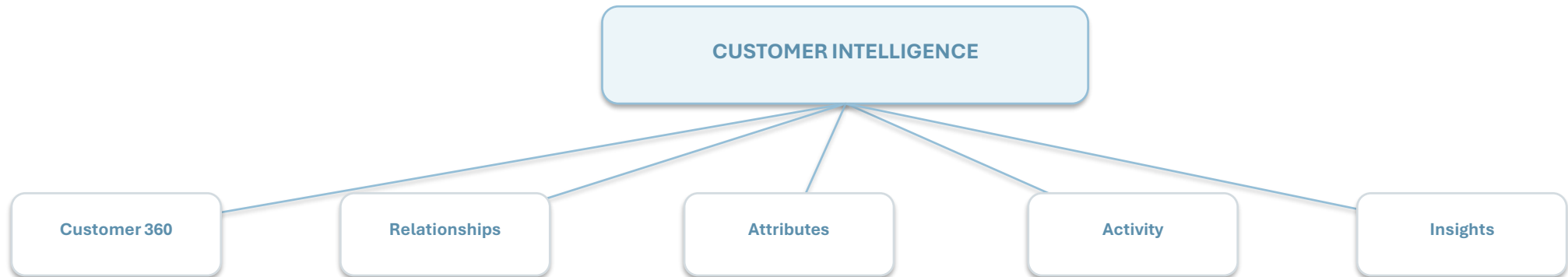
**Show the right level of information at the right time.**

The model moves from overview to insight, detail and action instead of asking users to absorb everything at once.



# Make the information model visible before making the interface detailed.

The structure needed to support customer context, exploration and decision-making without forcing users through a linear path.



## CONTENT HIERARCHY

- Overview - orient
- Insight - interpret
- Detail - investigate
- Action - decide

## IA RATIONALE

- Related information stays together
- Primary context remains visible
- Details appear when needed
- Action follows understanding

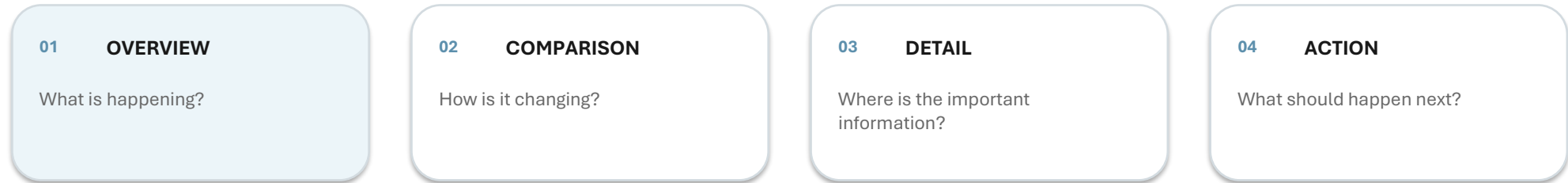
## DESIGN DECISION

**Keep the underlying customer model discoverable.**

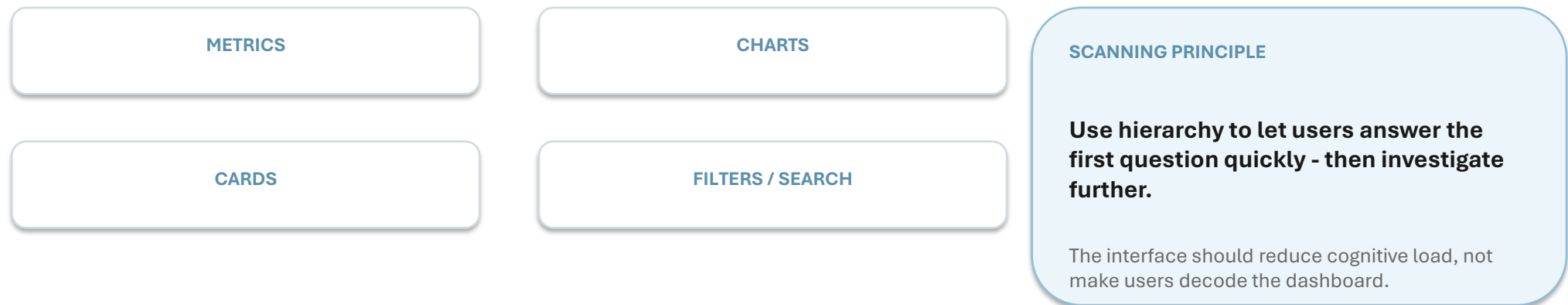
Users should move between context, relationships, activity and insights without losing orientation.

# Turn data into something users can scan, compare and investigate.

Hierarchy comes first; visualization supports the question the user is trying to answer.



## DASHBOARD DESIGN LANGUAGE



# Visualize the question, not just the data.

Visualization choices were tied to the decision or comparison the user needed to make.



## TREND

Is activity increasing or decreasing?



## DISTRIBUTION

How is the information divided?



## COMPARISON

Which category has more activity?



## RANKING

What are the highest-volume items?



## RELATIONSHIP

How are customers or identities connected?

### DESIGN PRINCIPLE

**A chart earns its place when it makes comparison, pattern or change easier to see.**

## A customer profile should answer more than “who is this person?”

The experience brings identity, relationships, attributes and activity together before asking the user to decide.

### CUSTOMER 360

## Customer profile

#### IDENTITY

Customer details and key attributes

#### RELATIONSHIPS

Connected people / entities

#### ACTIVITY

Engagement and recent behavior

#### INSIGHTS

Patterns worth investigating

#### QUESTION

What does the user need to understand?

#### CONTEXT

What surrounding information changes the interpretation?

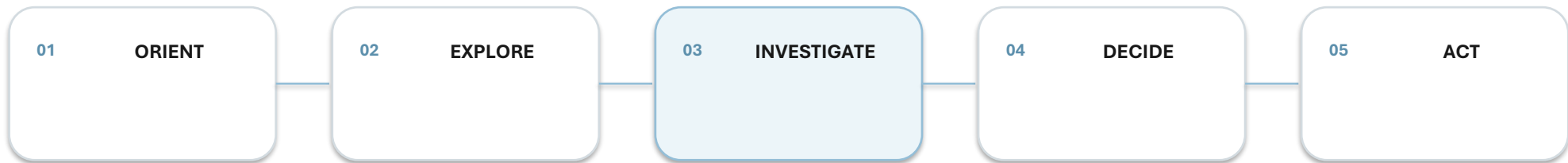
#### NEXT STEP

What should be easier to decide now?

**The design moves from context → understanding → decision.**

# Complex enterprise workflows still need a clear next step.

The interaction model keeps task context visible while allowing supporting information to be opened when needed.



## SUPPORTING INFORMATION

- Open the relevant detail
- Review without leaving the main task
- Close and return to the workflow

## CONSISTENCY ACROSS FLOWS

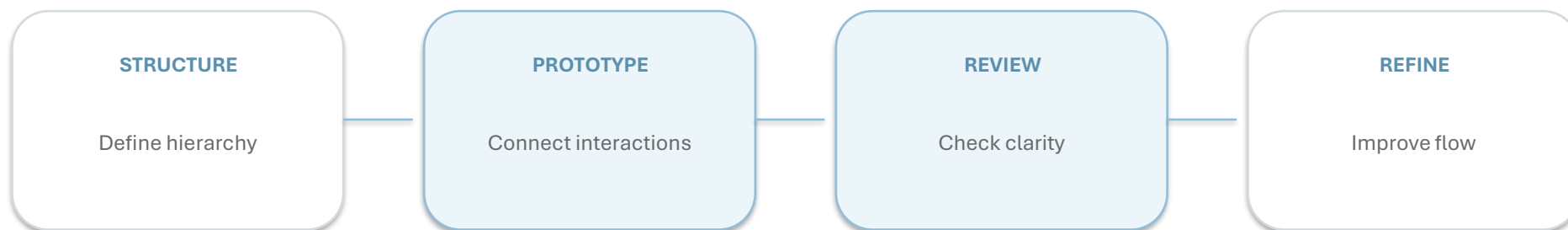
- Common navigation patterns
- Predictable interaction states
- Shared terminology and hierarchy

## KEY IDEA

**Keep the primary task focused while supporting context stays available.**

# Prototype the decision path, not just the screen.

Interactive prototypes helped communicate the intended information hierarchy, navigation and decision flow.



## WHAT I WOULD VALIDATE

- Can users understand the customer picture quickly?
- Can they find the detail that explains an insight?
- Does visualization support the decision rather than distract from it?
- Can users complete the next action without losing context?

Note: this case study does not claim measured usability or business outcomes from production.

# Systemize the experience so complexity does not multiply.

Shared patterns make a data-heavy product easier to scale across modules and workflow contexts.

NAVIGATION

METRICS

TABLES

CHARTS

FILTERS / SEARCH

CARDS

STATUS / ALERTS

WORKFLOW STATES

## PRODUCT PRINCIPLE

**Consistency should remove friction - not remove flexibility.**

Reusable interaction patterns create predictability while still allowing individual workflows to reflect their own context.

# From information architecture to interactive experiences.

My contribution spanned structure, interface design, visualization, interaction and communication.

## INFORMATION ARCHITECTURE

Structured complex customer information and relationships into understandable navigation and content hierarchy.

## DASHBOARD UX

Designed dashboard patterns that prioritize scanability, comparison and investigation.

## DATA VISUALIZATION

Used visual patterns to help users recognize trends, distributions, comparisons and relationships.

## INTERACTION DESIGN

Designed selection, navigation, workflow and decision-making interactions.

## VISUAL DESIGN

Established clear hierarchy, layout and visual language across data-heavy experiences.

## PROTOTYPING

Created interactive prototypes to communicate and refine the intended experience.

# One product, many data and decision contexts.

The experience had to support multiple information types without creating a collection of unrelated interfaces.



SHARED MODEL

**Customer → Data → Insight → Action**

The same mental model helped connect data-heavy exploration to meaningful decisions.

# From complex information to clearer decisions.

The design established a consistent UX approach for customer intelligence work across data-heavy enterprise contexts.

## CLARITY

Complex customer information organized into understandable structures.

## DISCOVERABILITY

Important information and capabilities easier to locate.

## COMPREHENSION

Visual hierarchy supports scanning and interpretation.

## DECISION SUPPORT

Data and insights lead toward a clear next step.

## CONSISTENCY

Shared patterns reduce relearning across the product.

## SCALABILITY

The experience model can support new data, workflows and capabilities.

## THE TAKEAWAY

**Good enterprise UX does not hide complexity. It gives complexity structure.**

# Design for understanding first.

The work was grounded in one simple principle: make complex customer intelligence easier to understand, explore and act on.

“

**The goal was not simply to display more data,  
but to make the next decision clearer.**

Customer Intelligence · UX / UI · Information Architecture · Dashboards · Data Visualization · Workflows · Prototyping

## CONFIDENTIALITY NOTE

Original production screens are omitted. The diagrams and visual models in this case study represent the design structure, not production UI.