

UI/UX and Product Strategy for B2B SaaS Companies.

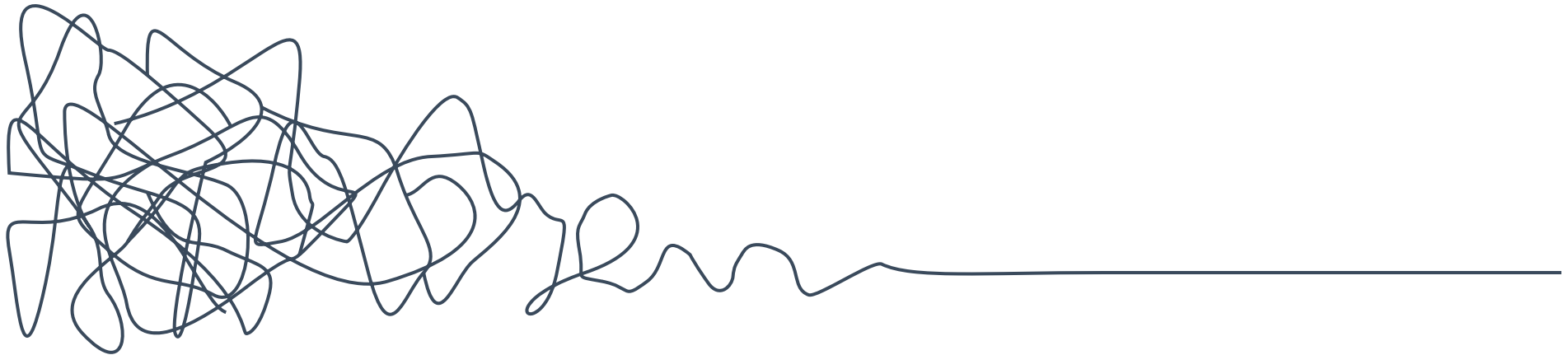
Jose Bautista

Last update: September 2023



Noise / Uncertainty

Clarity / Focus



Without me



With me



Let's build an awesome B2B SaaS, together.

I'm Jose Bautista, a UI/UX Designer and Entrepreneur from sunny Barcelona, Spain, working with SaaS around the globe. Over 12+ years I've helped 20+ SaaS companies find market fit and grow their revenue. I've also built a few tech startups along the way too. Check out some examples here.

Design relaunch

Project: Culturebook.io - People analytics and behavioural platform.

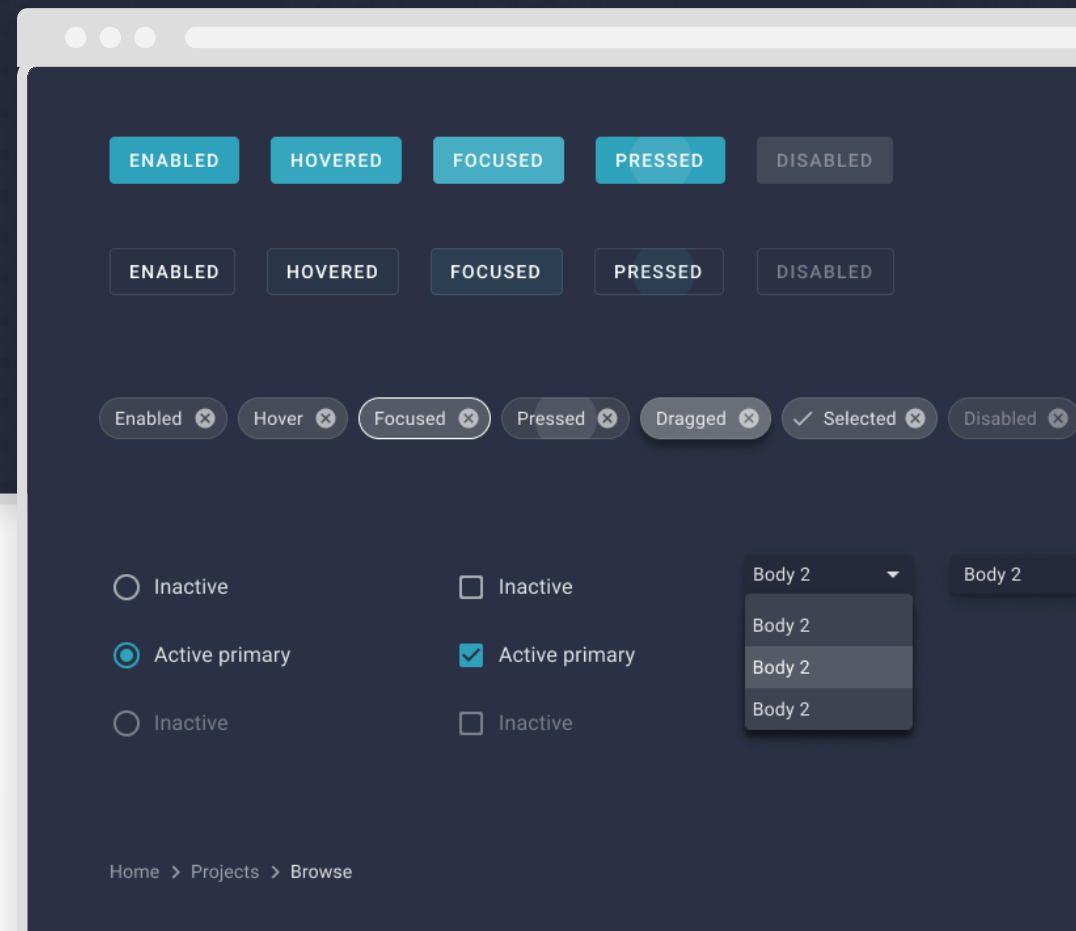
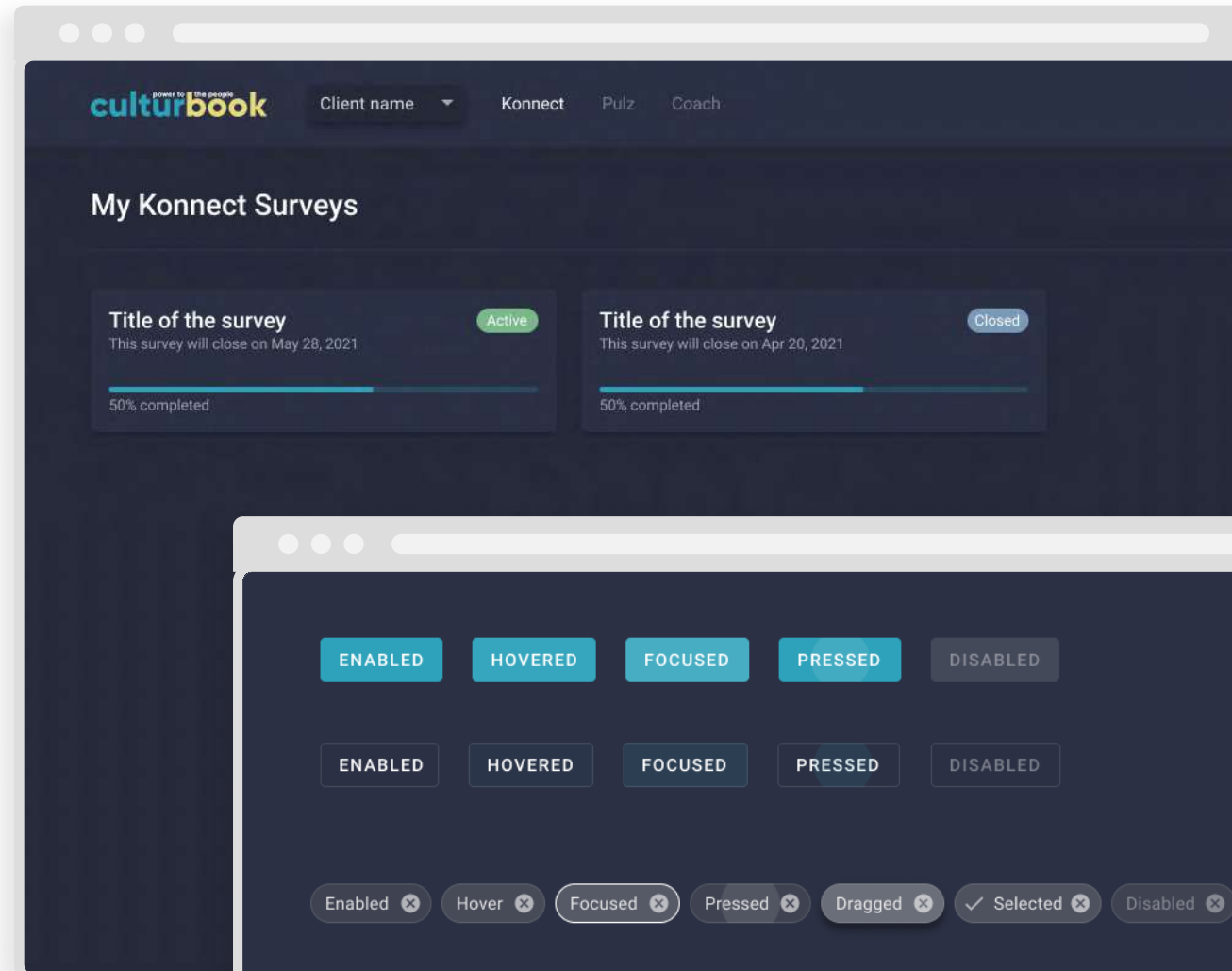
Role: Product designer

Situation

While very powerful SaaS, the platform wasn't really self-service, and so required plenty of onboarding. Naturally, this affected the speed of potential growth. The product had also outgrown its original vision and design, so a complete overhaul was needed.

What I added to the project:

- **Collaboration:** with the CEO, CTO, and CSM.
- **Ideation:** Coming up with ideas and ways to align the new vision.
- **Experience:** Analysing user patterns and behaviour to improve journeys.
- **Design:** Designing a new UI kit to meet users' evolving needs.
- **Prototyping:** Creating high-fidelity prototypes using Figma.



We worked with Jose on designing our enterprise SaaS software from scratch, and we're delighted with the results. Jose quickly understood our complex product, value proposition and target customer, and used a robust workflow that allowed us to work with him remotely smoothly and efficiently. We're looking forward to partner up with him on upcoming projects. Great experience and highly recommended!



Haider Imam
CEO and Co-founder of [Culturbook.io](https://www.culturbook.io)

UI revamp

Project: featureupvote.com - B2B SaaS platform for product managers

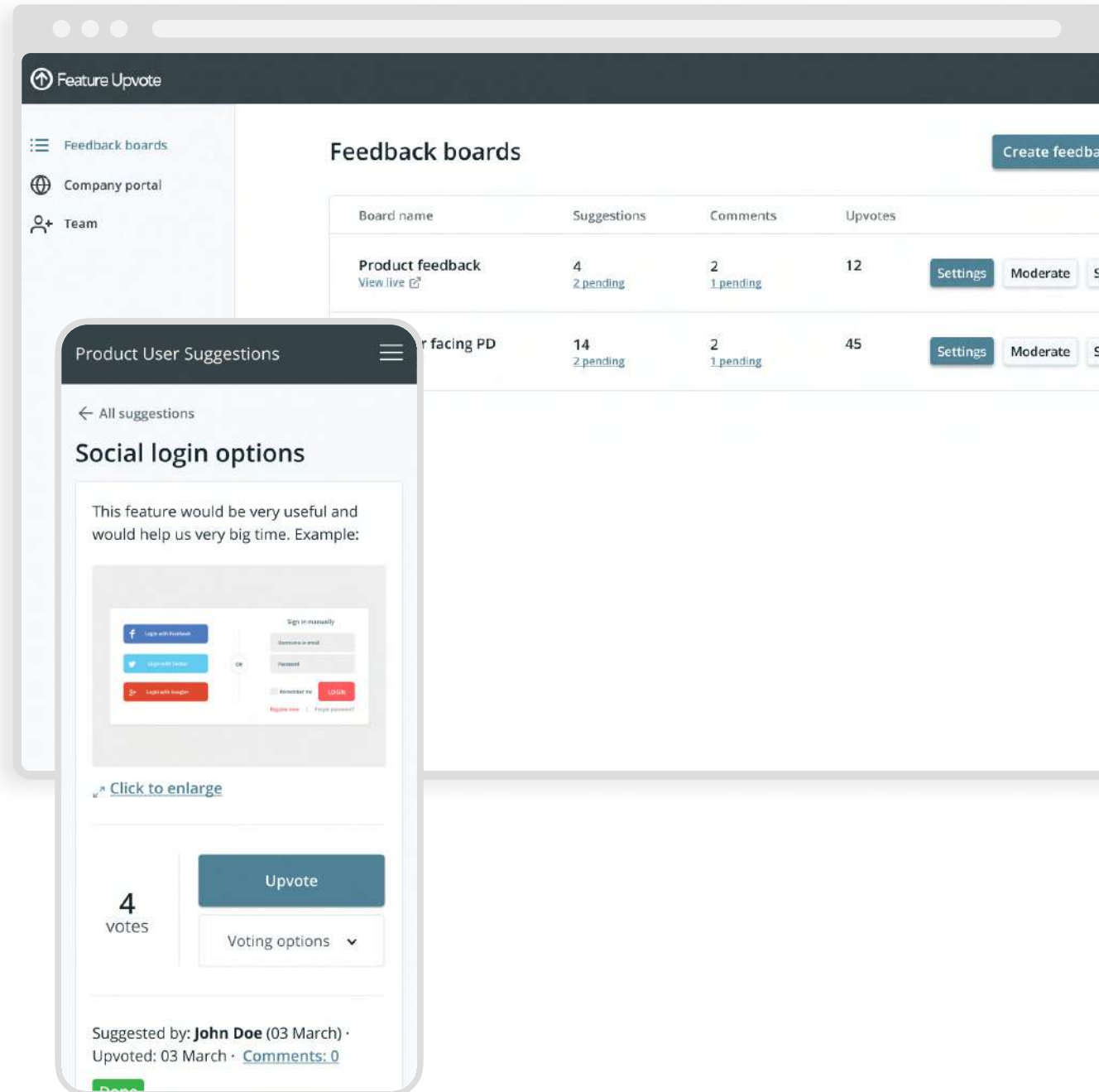
Role: Product Designer

Situation

The client had been getting feedback that the UI was looking a bit out-dated. User feedback software is a busy and competitive market, so we needed to move fast and in the right direction.

What I added to the project:

- **UI & UX audit:** analysed and identified areas for improvement and actions, by combining quantitative research and user feedback.
- **UI design:** based on the feedback, redesigned the UI to be more modern-looking and scalable for future growth.
- **Incremental strategy:** changes were made in increments, to gradually introduce users to the improvements, and to track impact and quickly make changes if necessary.



Jose had the ability to quickly understand the value proposition of my service, and his report has helped us to effectively build a more consistent and solid user experience.



Steve McLeod

Founder of FeatureUpvote and SaberFeedback

Design sprint

Project: smartmonkey.io - last-mile routing software for optimising logistics.

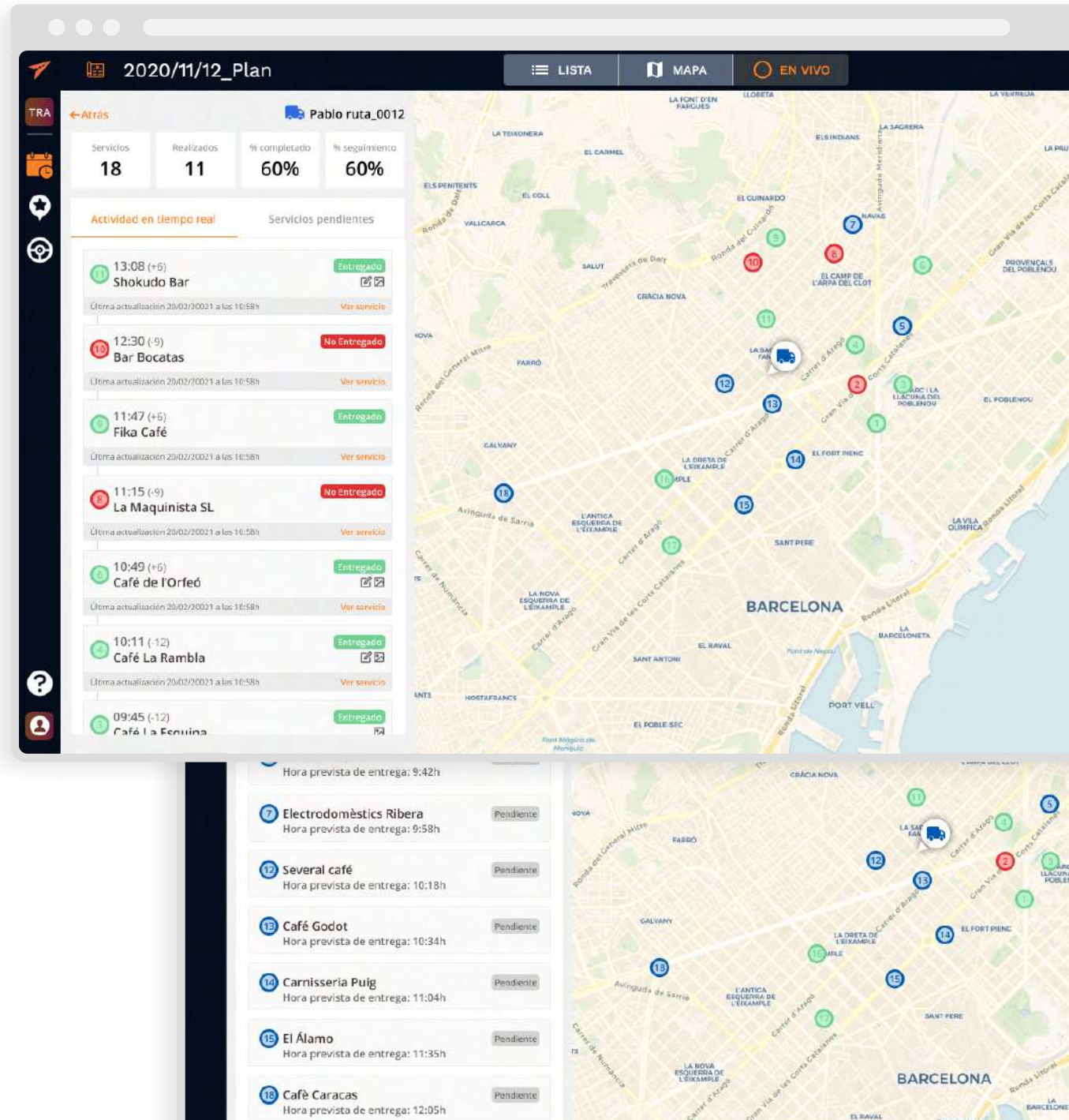
Role: Product Designer

Situation

Customers were demanding a critical feature: real-time visualisation for showing how the routes were performing. This would enable cost savings, improve customer experience, and support scaling of deliveries, among many other benefits.

What I added to the project:

- **Collaboration:** teamed up with the CEO and CTO to run design sprints for generating ideas and concepts.
- **Wireframing:** prepared and refined the chosen ideas.
- **Iteration:** tested the idea with active customers and iterating based on their feedback.
- **Creation:** designed the final solution, with all material prepared for the development team.



Machine learning-powered customer experience

Project: Reply.ai - Machine learning-powered ecommerce support. Reply.ai supplies answers to customers by extracting relevant sentences from chunks of FAQs.

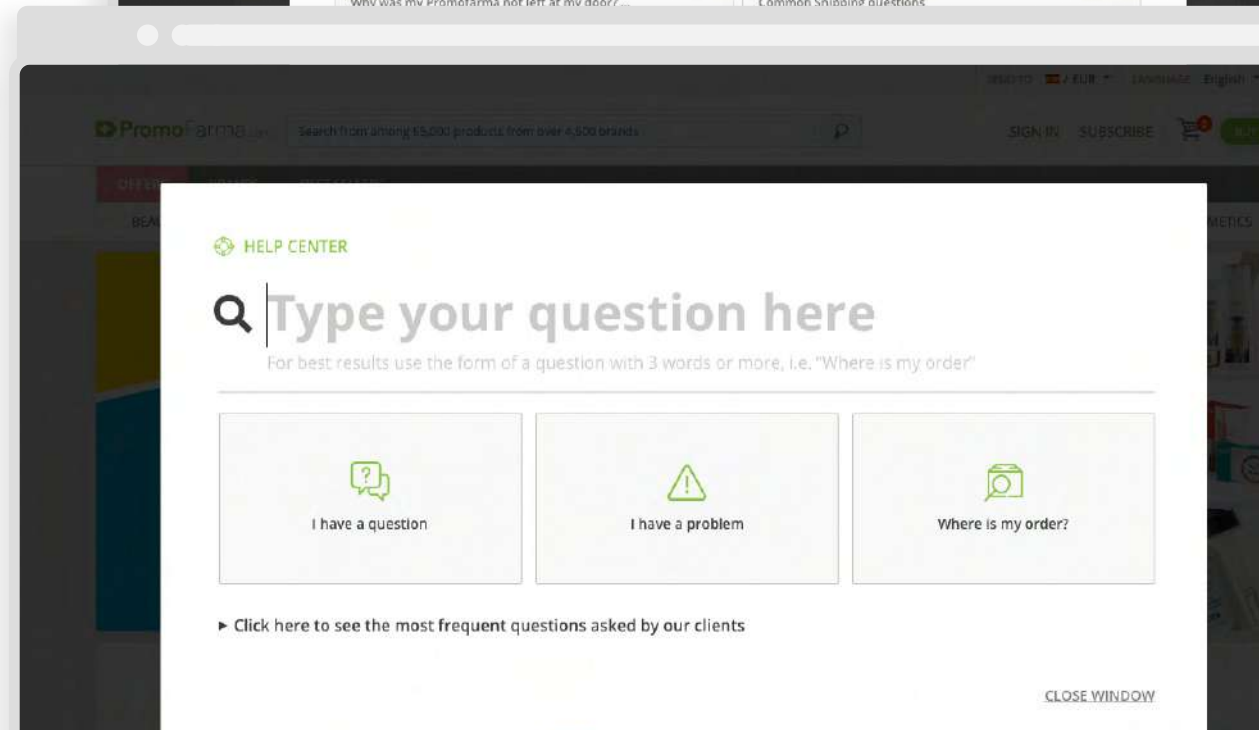
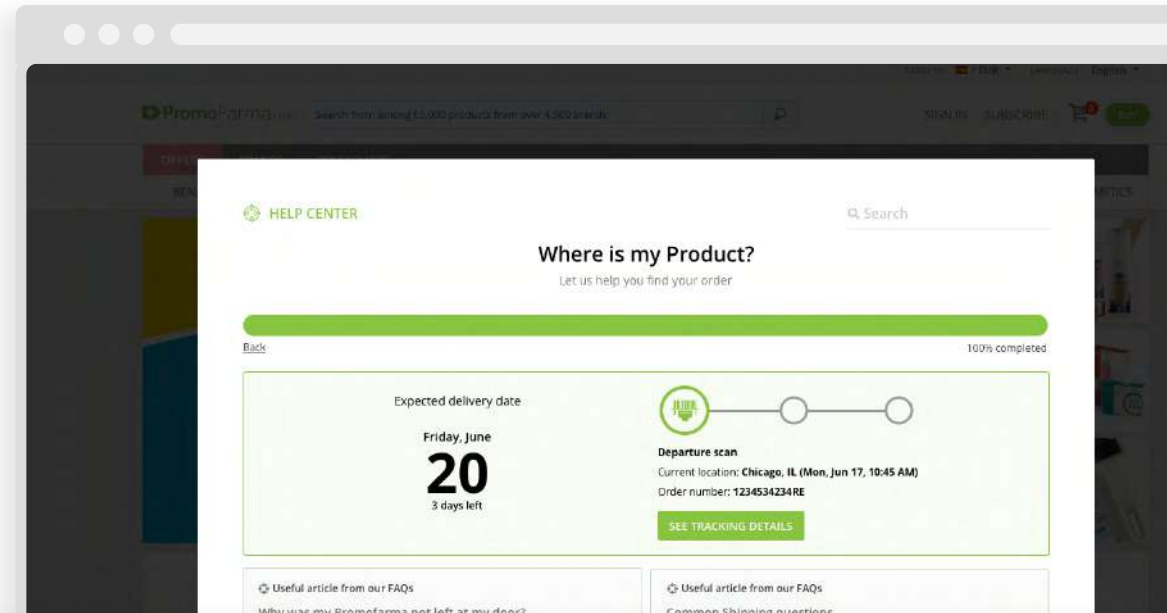
Role: Product Designer

What I added to the project:

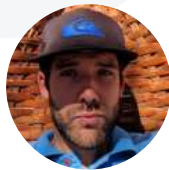
- **Collaboration:** working with the CEO and Head of Product to define the software experience.
- **Product experience:** ran a series of iterations to keep development running smoothly and making sure engineers were focused on the right areas.
- **UX testing:** ran multiple sessions to understand and improve user journeys.

Results:

- **15% reduction in support tickets**
- **Company acquired by Kustomer**



Jose's overarching concern is delivering a product that meets the user's needs. He goes an extra mile to understand your business goals, your customers goals and incorporates that into the product experience. He is very approachable and communicative. His talent and level of skill exceeded our expectations.



Ibon Pintado
Head of Product at Reply.ai

B2B SaaS companies I've co-founded

Some examples of how I combine my love of SaaS, product design and talented teams.

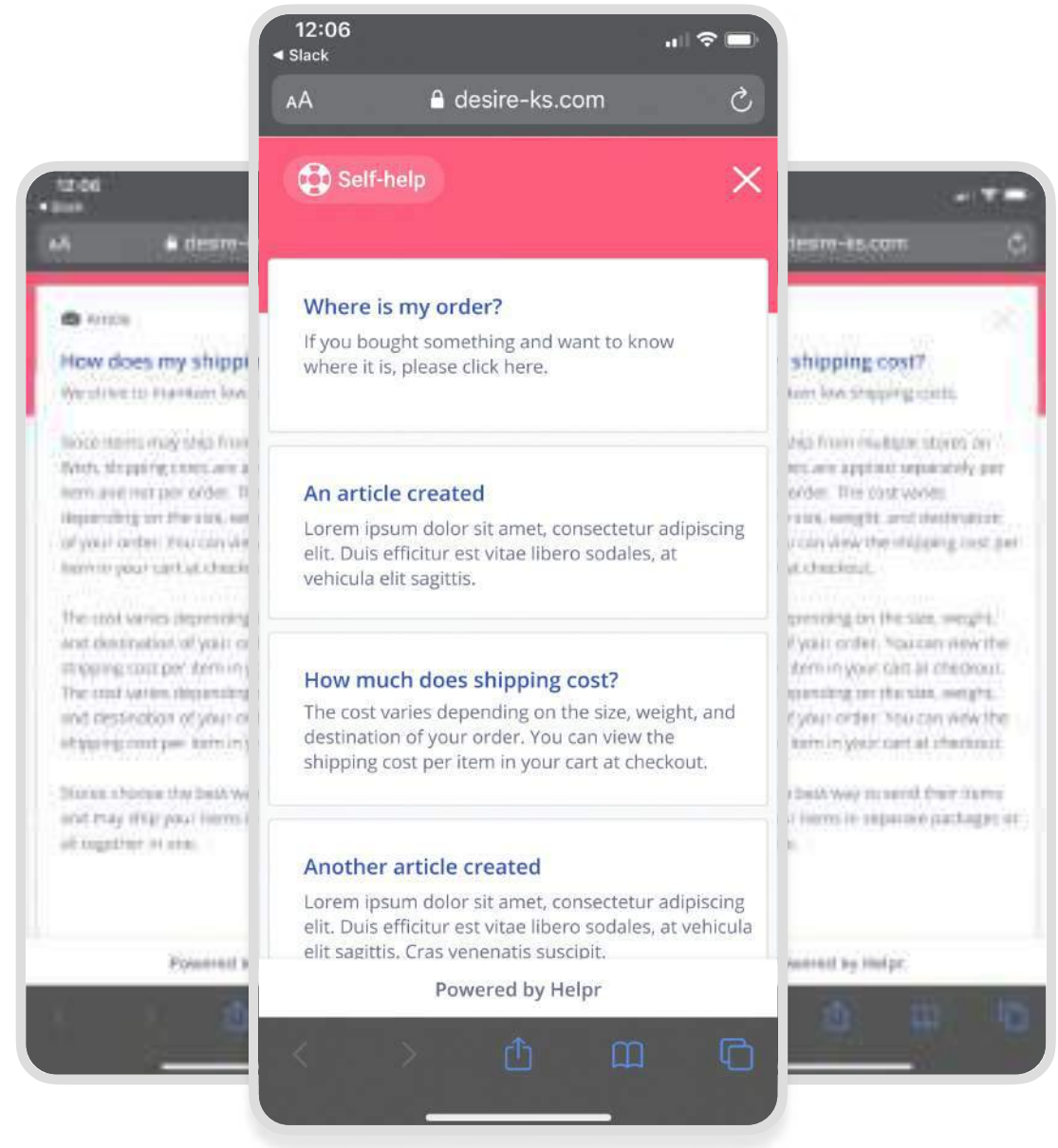
Shopify widget & FAQ

Project: Usehelpr.com - online FAQ customer support for Shopify merchants
Helpr helps Shopify merchants reduce support tickets by giving customers answers quicker. This is done through a self-help customisable widget and beautiful, powerful and easy-to-use FAQ pages.

Role: Co-Founder & Product Designer

What I added to the project:

- **Creating the experience:** using the Polaris UI kit (Shopify's front end framework).
- **Customer insight:** customer support and managing requests, to help build retention.
- **Branding:** collaborating with the marketing team on material such as banners, appstore images, iconography.



Helping customer success teams be more successful

Project: Saizmo.com - B2B SaaS customer success tool for retaining customers.

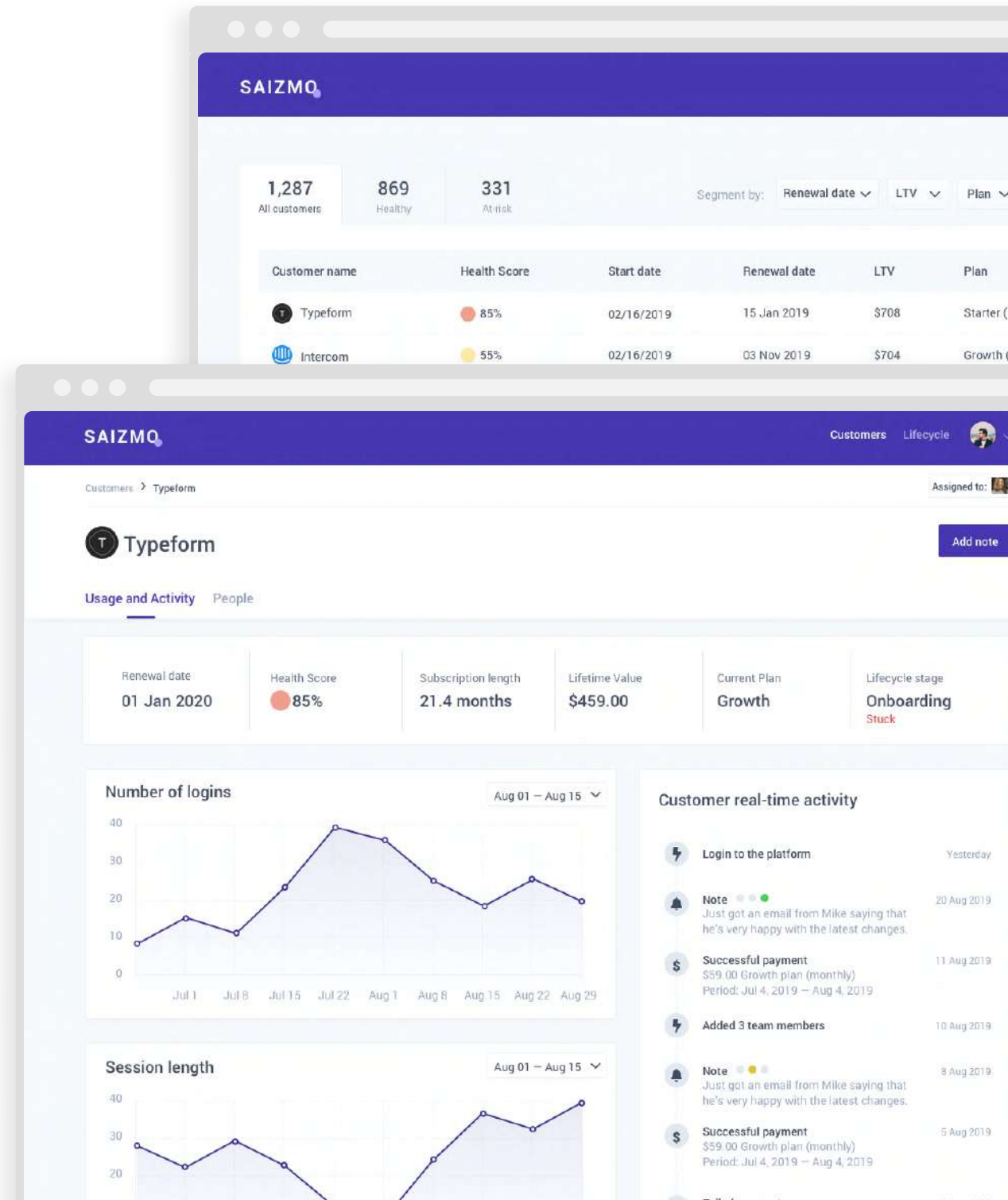
Role: Co-Founder & Product Designer

What I added to the project:

- **Customer interviews:** running customer interviews, to learn more about CSM's work, problems to improve our value proposition.
- **UI/UX design:** rapid prototyping to build and optimise the design and user experience, and creation of the UI kit and visual design.
- **Reporting & collaboration:** Work directly with the CTO while implementing the entire service and keeping track of progress

Result

After 6+ months of bootstrapped growth, alongside beta testing with customers, COVID-19 came along. The pandemic hit us hard, so we decided to close the project to focus on our other businesses.



Performance management tool for Agile teams

Project: newsteer.com

Role: Co-Founder & Product Designer

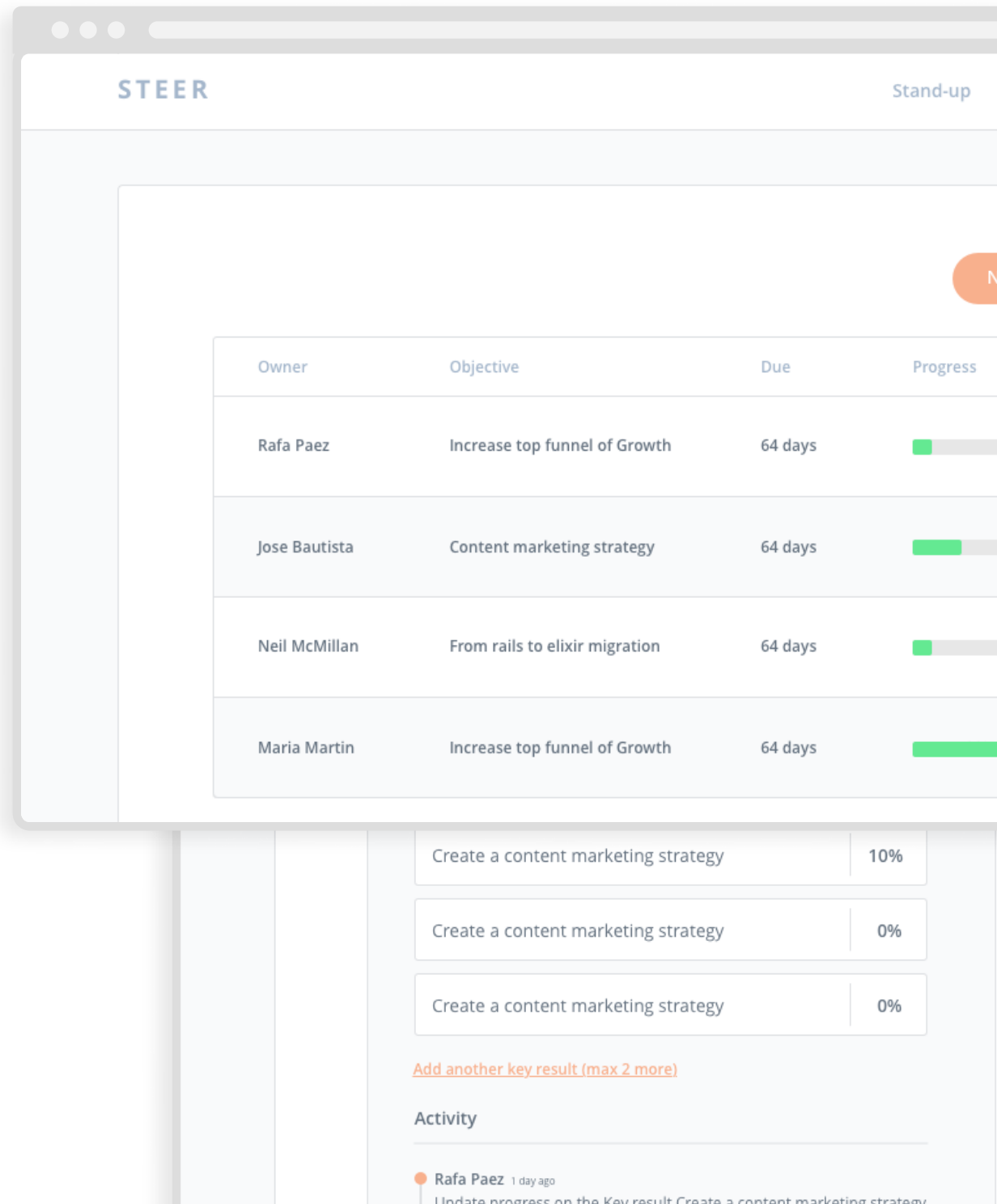
As a business founder, I've lots of experience managing teams of talented people. I also have experience of how hard it is to keep everyone motivated, aligned, and productive. Especially when everyone is based in different places.

What I added to the project:

- **Co-built Steer:** we wanted to use it with our team, to solve the challenges of collaborative remote working.
- **UI/UX:** this included creating prototypes.
- **Testing:** testing on ourselves, as the ultimate form of dogfooding.

Result

After 1+ year of growth, we accepted an acquisition offer.



Thank you for your time!

Jose Bautista

Dribbble · LinkedIn · Twitter · Web

