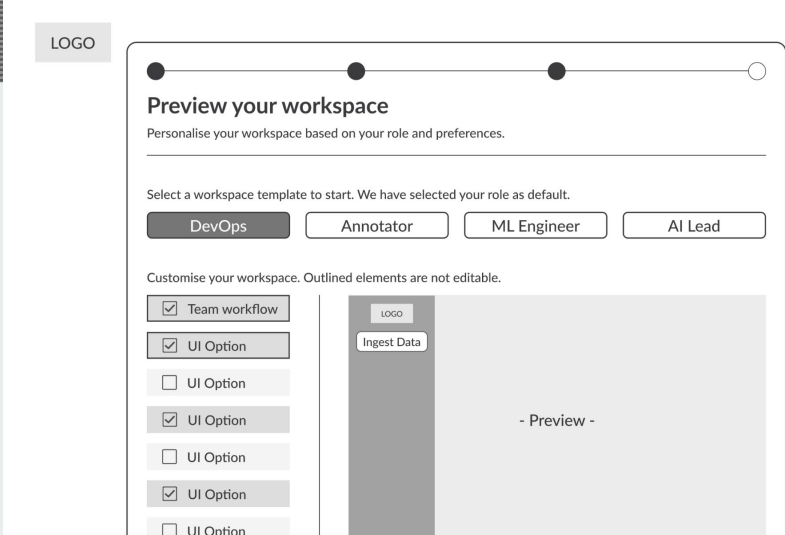


Tailored Onboarding for Multimodal AI Teams

Persona-Based UX Strategy
by Sim Deol



LOGO

Preview your workspace

Personalise your workspace based on your role and preferences.

Select a workspace template to start. We have selected your role as default.

DevOps Annotator ML Engineer AI Lead

Customise your workspace. Outlined elements are not editable.

- Team workflow
- UI Option
- UI Option
- UI Option
- UI Option
- UI Option
- UI Option

LOGO

Ingest Data

- Preview -

Outline

1 - Problem framing & approach

2 - Personas

3 - Key flows

4 - Wireframes - DataOps

5 - Further Exploration

6 - Wrap-up

7 - Questions

1 - Problem Framing & Approach

The Problem

One-Size-Fits-None

How might we design an onboarding experience that tailors the platform to each persona while maintaining cross-team collaboration capabilities?

Note: I will focus solely on the user onboarding experience for this task.

The Problem - Deeper dive

The “One-Size-Fits-None” interface means that all personas, despite having very different goals, workflows, and feature needs, are presented with the same UI. This results in:

- Steep learning curves
- Feature underutilisation or misuse
- Inefficient collaboration due to lack of role-specific context

This creates both a usability and a cross-functional coordination issue. The challenge is to **tailor** user experiences without **siloin**g teams.

Approach Overview

Designing onboarding not as a tour, but as a gateway into focused, role-relevant workflows.

- AND -

Understanding what data is relevant to show between different roles.

2 - Personas

Some data points are marked '💭 *Hypothetical insight*' — they reflect the type of product insights I would use if available, to better tailor UX strategy.

#1 - DataOps



Leo

DataOps

“As a DataOps Engineer, I want to ingest and validate datasets with the correct schema and ontology, so that annotation teams can start work without pipeline issues.”

Goals:

- Register, ingest, and organise large datasets efficiently
- Ensure metadata consistency and ontology alignment
- Maintain high data quality before annotation begins

Key Tasks:

- Setting up data integrations (e.g., AWS S3, GCP)
- Applying metadata filters, deduplicating data
- Managing indexing and pre-labeling QA checks

Pain Points:

- Cluttered UI with ML-focused features he doesn't need
- Lack of clarity on ingestion errors or missing metadata
- Hard to track annotation readiness at dataset level

Needs from Onboarding:

- Fast path to dataset registration and metadata setup
- Ability to test API/SDK setups quickly
- Clear feedback loops for ingestion validation

 Hypothetical insight




Hypothetical Insight into Leo



22%

of DataOps tickets in the first 2 weeks are
Ingest errors.

*Source assumption: Support logs, ingestion
logs*

Design impact:

- Validates the need for ingestion validator, live schema preview
- Supports decision to make onboarding include test dataset upload

#2 - Annotator



Maya

Annotator

“As an Annotator, I want to quickly understand my labeling task and tools, so that I can complete high-quality annotations without confusion or errors.”

Goals:

- Complete tasks accurately and efficiently
- Understand labeling rules and edge case handling
- Get timely feedback and improve QA scores

Key Tasks:

- Annotating image/video/DICOM files
- Submitting tasks for review
- Fixing rejected tasks and learning from errors

Pain Points:

- Overwhelming UI with irrelevant features
- Confusing QA feedback mechanisms
- Repetitive task switching without context

Needs from Onboarding:

- Lightweight tour focused on annotation UI only
- Access to tutorials, guides, and sample tasks
- A “My Feedback” dashboard to track QA performance

 Hypothetical insight




Hypothetical Insight into Maya



35%

of new Annotators abandon their first session before submitting a single task.

Source assumption: Internal task logs, session analytics

Design impact:

- Justifies progressive onboarding flow with confidence-building tutorial
- Supports adding feedback/QA overlay right after task 1

#3 - ML Engineer



Jay

ML Engineer

“As an ML Engineer, I want to identify labelling inconsistencies and edge cases after training, so that I can improve model performance with accurate debugging.”

Goals:

- Train and improve model performance
- Identify low-quality labels and data gaps
- Evaluate project datasets with Encord Active

Key Tasks:

- Import/export annotations and predictions
- Use embeddings and filters to debug datasets
- Collaborate with Annotators and DataOps to fix issues

Pain Points:

- Frustration navigating to debugging tools buried in UI
- Annotation tools and tasks distract from his priorities
- Hard to trace QA issues back to model performance

Needs from Onboarding:

- Jumpstart into Encord Active & filtering features
- Examples of how to trace model issues to label quality
- Workspace tuned for exploration, not annotation

 Hypothetical insight




Hypothetical Insight into Jay



60%

**of ML Engineers time is spent debugging
annotation issues post-model training.**

*Source assumption: Interviews or workflow
tagging*

Design impact:

- Justifies “flag + assign” system directly from Active
- Explains why the interface prioritizes traceability and shared issue feeds

#4 - AI Lead



Lena
AI Lead

“As an AI Lead, I want to track team progress and detect bottlenecks across workflows, so that I can ensure alignment, quality, and timely delivery of AI initiatives.”

Goals:

- Coordinate DataOps, Annotation, and ML workflows
- Monitor quality, timelines, and workforce efficiency
- Report progress to leadership and unblock issues

Key Tasks:

- Setting up projects, managing timelines and teams
- Tracking throughput, task approval rates, and issues
- Overseeing cross-project analytics and dashboarding


Pain Points:

- Cannot easily zoom out across multiple projects
- Too much granularity when she wants summaries
- Difficult to identify stuck teams or edge case issues

Needs from Onboarding:

- High-level project dashboard setup
- Team management and permissioning tour
- Suggestions for alert setup, progress metrics, and tag usage

 Hypothetical insight




Hypothetical Insight into Lena



80%

of Project Leads often discover annotation quality issues *only after* model performance drops, too late to take corrective action

*Source assumption: Internal task logs,
session analytics*

Design impact:

- Requires a dashboard with real-time QA pass rates, annotator-level metrics, and bottleneck alerts
- Supports adding means of clear communication/alerts at all levels of the process

Summary

Each persona's onboarding should surface:

- Their *most critical tools first*
- Guided walkthroughs based on their workflows
- Clear handoff or collaboration touchpoints



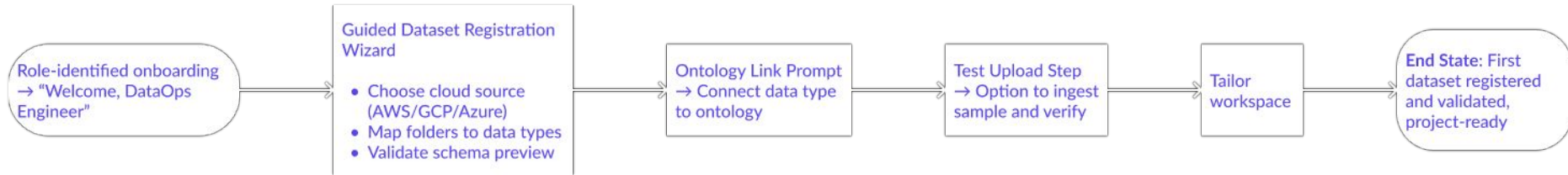
Persona	Priority Flows	Needs Clarity On
DataOps	Register datasets, define ontologies	Metadata, ingestion validation, QA triggers
Annotator	Receive tasks, complete & revise annotations	Ontology guidance, QA feedback
ML Engineer	Import/export model predictions, use Active	Debugging annotations, Active usage
AI Lead	Create projects, track progress, manage roles	Team setup, dashboards, bottlenecks

3 - Key Flows

This solution focuses on **user-level onboarding** — the moment a new user first lands in the platform. I've assumed they've been invited by an Org Admin and assigned the correct project permissions. From there, the goal is to onboard them into **their most relevant workflows** without friction.

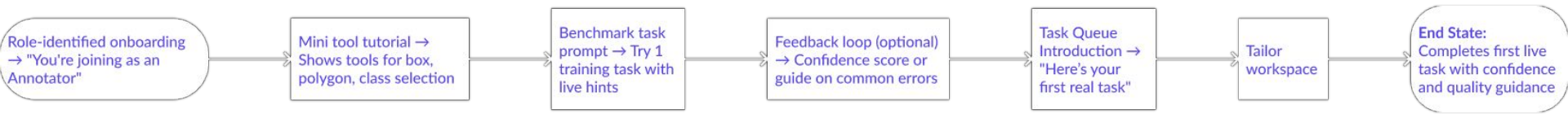


DataOps: “Structured Ingest Setup”



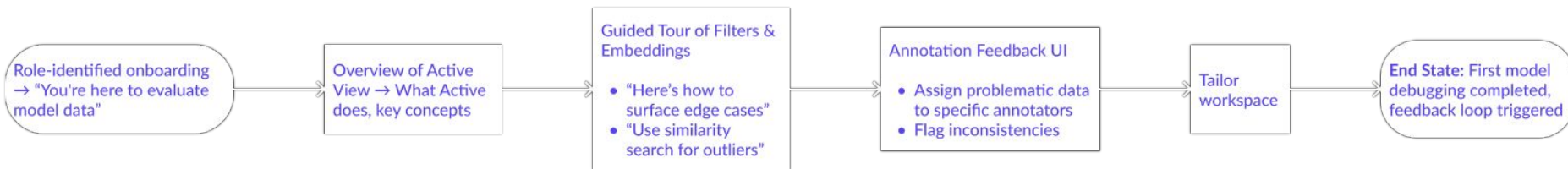


The Annotator: “Confident Start, QA-Ready”



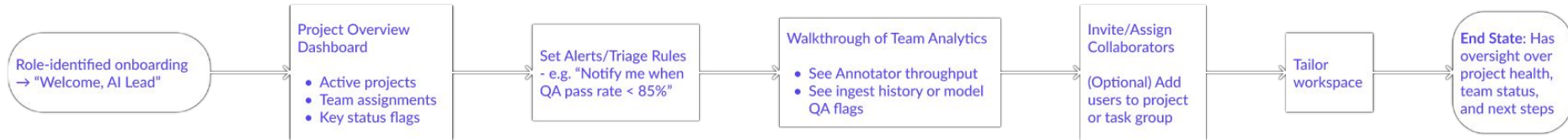


The ML Engineer: “Debug-First Mindset”





The AI Lead: “Cross-Team Clarity”



4 - Wireframes - DataOps

These wireframes represents the most critical moment in the onboarding journey – the point where Encord adapts to who the user is.

We do this by recognising a user's role on login and routing them into the workflows most relevant to their job

LOGO

Welcome Sim, you're joining as a DataOps Engineer

As a DataOps Engineer you will:

- Ingest data from cloud storage providers
- Structure Datasets with relevant metadata
- Ensure data quality for annotation and model training

Get started

(click [here](#) if this is incorrect)

LOGO

Let's register your data

Set up some connections

Local

AWS

GCP

Azure

Other

Select provider

Connect

Connect Manually

[< Back](#)

[Skip this for now](#)

If the user proceeds to connect data at this point they will go through the standard steps of registering data in the platform, with the ability to skip these sections for now:

1. Set up an AWS integration.
2. Create an AWS integration in Encord.
3. Create a JSON or CSV.
4. Create a folder to store your data in Encord.
5. Register your data to the folder.
6. Link Schema/Ontology

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Continue

[< Back](#)

[Skip this for now](#)

Core CTA is relevant to the user type.

5 - Further Exploration



Modular interface / adaptive workspace

- Interface modules shown/hidden based on role or task
- Toggle between “Focused View” and “Collaborative View (a Kanban style workflow)”
- **Rationale:** Preserves deep workflows while allowing switch to shared context



Persona dashboards

- *DataOps* → ingestion status, schema
- *Annotators* → task queue + QA feedback
- *ML Engineers* → label quality analytics
- *AI Leads* → project health & team activity
- **Rationale:** Fast access to role-critical information



Smart project templates

- Pre-configured flows with persona-specific templates (e.g., medical video QA, fish-eye retail labeling)
- **Rationale:** Reduces setup complexity and guides best practice



Cross-team collaboration layer

- Persistent shared project activity stream as a separate screen.
- Commenting across data units (tag collaborators)
- **Rationale:** Ensures collaboration even with role-specific views



Further exploration

- Persona-based usage analytics to auto-tune UI
- AI-driven onboarding tips (e.g., GPT-powered assistant for workflows)
- Gamified annotation training for onboarding annotators

6 - Wrap-up

What I'd expect
to explore with
more time...

- Prototyping role-switch logic
- Feedback dashboards,
- AI assistant

Questions?

