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A redesigned first-run path for Northline workspace admins

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Where things stand

Thanks for the call on Thursday. Here is what I took away.

New workspace admins at Northline go through a 12-step setup checklist that was built three years ago. Teams often stall somewhere in that checklist, before the admin invites anyone else. Customer Success is covering the gap with a lot of screen-share onboarding.

You want a redesign of the first-run experience for workspace admins. Not the marketing site. Not a full product redesign. The work needs to be shippable in 6 to 8 weeks from a start in early December, so your front-end team can have it in market before the March partner launch.

You already have a Figma design system and a front-end team who will build this. You asked two specific questions: how I would work inside that design system, and how handoff to engineering would go. Both are answered below.

What I think the problem is

A 12-step checklist asks a new admin to do a lot of configuration before they get anything back. The invite step, which is where a workspace turns into a team, is buried behind setup chores. The order of steps was probably right for the product three years ago. It is unlikely to be right now.

The goal is a first-run path that gets an admin to a usable workspace and to inviting colleagues with as few decisions as possible, and defers everything else until it is needed. The details of which steps to cut, merge, or defer should come from the audit and from talking to the people who use it, not from assumptions on a call.

Approach

The work has five parts. Each one produces something you can review.

1. Audit of the current first-run and setup checklist. I walk the current path as a new admin, step by step, and map every decision, field, and dead end. I also go through what CS sees on their screen-shares, since they already know where people get stuck. Output: an annotated map of the current path with the stall points marked.

2. Short research with admins and CS. Three to five conversations with recent workspace admins or CS people, 30 to 45 minutes each. The aim is narrow: what did they need in the first session, what did they skip, and what made them stop. You would arrange access in week one. Output: a one-page summary of findings that we use to make decisions, not a research report.

3. Information architecture for the new path. A proposed sequence for the first run: what happens on day one, what is deferred, where the invite moment sits, and what the admin sees when the workspace is still empty. Output: a flow diagram and a written rationale we review together before any screens are drawn.

4. Design in your Figma design system. Mid-fidelity screens first, so we can argue about structure cheaply. Then high-fidelity screens built from your existing components, tokens, and patterns. Where the design system does not have a component the path needs, I will propose one in your system's conventions and flag it clearly, rather than inventing a parallel style. Output: mid-fi and hi-fi screens for the core path, plus empty states, in a file your design lead can own after I leave.

5. Clickable prototype and annotated handoff for engineering. A Figma prototype of the core path so stakeholders can click through it rather than read about it. Then an annotated handoff: screen-by-screen notes on states, edge cases, copy, and what is reused versus new. I join one or two working sessions with your front-end team at handoff to answer questions and adjust. Your team builds it. I do not write production code.

How I work with your design system

I treat your design system as the source of truth. That means:

- I build in your Figma file, or a branch of it, using your components and tokens, not detached copies.
- Any new component or variant I propose is documented as a proposal, named in your conventions, and placed where your design lead expects to find it.
- I do not restyle existing components to suit the new flow. If a component needs to change, I say so and let your team decide.
- At the end, your design lead gets a file they can maintain, not a one-off.

How handoff to engineering works

Handoff is part of the work, not an afterthought. In practice:

- Your engineering contact is invited to the IA review and the mid-fi review, so there are no surprises at the end.
- The annotated file covers each screen's states (empty, loading, partial, error), the logic for showing or skipping steps, and copy.
- I hold one or two working sessions with the front-end team at handoff. The first is a walkthrough. The second, if needed, is for questions that come up once they start building.
- The prototype stays available as the reference for intended behavior.

Options

All fees are in US dollars, fixed, and include everything listed. Fees are valid until 6 December 2026. Start is the week of 8 December if we confirm by the end of November. I am booked the last week of December, so the schedule below treats that week as a pause with no critical reviews.

Option A: Audit and redesign

For a team that wants the redesign done with input from CS, but does not want to arrange admin interviews.

Includes:

- Audit of the current first-run and setup checklist
- One working session with CS to capture what they see on screen-shares
- Information architecture for the new path, with a review
- High-fidelity screens for the core path in your design system, including empty states
- Clickable prototype of the core path
- Annotated handoff file
- One handoff session with engineering

Not included: admin research interviews, a separate mid-fi round, a second engineering session.

Timeline: 6 working weeks plus the pause week (7 calendar weeks). Handoff the week of 19 January. Fee: $9,500

Option B: Research, redesign, and handoff (recommended)

The full approach described above.

Includes:

- Audit of the current first-run and setup checklist
- Three to five research conversations with recent admins or CS, with a one-page findings summary
- Information architecture for the new path, with a review
- Mid-fidelity screens and a structural review
- High-fidelity screens for the core path in your design system, including empty states
- Clickable prototype of the core path
- Annotated handoff file
- Two working sessions with engineering at handoff

Timeline: 8 weeks, including the pause week. Handoff the week of 26 January. That leaves February for your team to build ahead of March. Fee: $13,500

Option C: Option B plus a post-launch iteration pass

Everything in Option B, plus a short second pass after the new path has been live for a few weeks.

The iteration pass includes:

- Review of what you are seeing in the live product and from CS
- Up to two rounds of design adjustments to the core path, in the same file
- One session with engineering to hand over the changes

Timing of the pass: scheduled with you once the new path ships, likely in April, a few weeks after it ships. Fee: $17,000

Why I recommend Option B

The question you are really trying to answer is why admins stop before they invite anyone. Three to five conversations with admins and CS is the cheapest way to find out, and it makes every later decision faster and less contested. The mid-fi round gives your design lead and engineering a point to push back on structure before hi-fi work is done. Eight weeks still lands handoff in late January, with February clear for your team to build before March.

Option A is a sensible choice if you cannot arrange admin access in week one. Option C only makes sense if you already know you will want a second pass and prefer to price it now rather than later.

Working together

Schedule, Option B.

- Week of 8 Dec: kickoff, design system walkthrough, audit begins. You arrange research access.
- Week of 15 Dec: research conversations and audit complete.
- Week of 22 Dec: findings summary and first IA proposal. IA review with you, your design lead, and engineering.
- Week of 29 Dec: pause. I am booked. No critical reviews.
- Week of 5 Jan: mid-fi screens. Structural review.
- Week of 12 Jan: hi-fi screens in your design system.
- Week of 19 Jan: prototype, empty states, annotations.
- Week of 26 Jan: handoff sessions with engineering. Final file delivered.

Cadence. One 30-minute check-in each working week, plus the three scheduled reviews (IA, mid-fi, handoff). Async comments in Figma between those. I work US Eastern hours.

Tools. Your Figma design system and file. Whatever you use for messaging and docs; I will join.

What I need from you.

- A single decision-maker for design calls. I assume that is Priya.
- Access to your Figma design system in week one.

- Three to five recent admins or CS people lined up for conversations in week one (Options B and C).
- An engineering contact who can join the IA, mid-fi, and handoff reviews.
- Current analytics or CS notes on where admins stall, if you have them. Not required.

Handoff. You receive the Figma file with mid-fi and hi-fi screens, the prototype, the annotated handoff, the audit map, and the research summary. All of it lives in your workspace. Nothing stays with me.

Assumptions and what is not included

Assumptions:

- Scope is the first-run path for new workspace admins. The rest of the app is out of scope.
- Your front-end team builds the work. I design and hand off. I do not write production code.
- Your design system covers most of what the path needs. New components, if any, are proposed in your conventions and are few.
- Research participants are arranged by you in week one. If access slips, the research step compresses or the timeline moves by the same amount.
- Review feedback comes back within two working days so the schedule holds.
- The core path is one flow. If the audit shows that different admin types need materially different paths, we talk about scope before I design more than one.

Not included:

- Production front-end code or implementation support beyond the handoff sessions
- Marketing site or any redesign outside the admin first-run path
- A large research program, surveys, or quantitative testing
- Ongoing or retained design work after handoff
- Copywriting beyond the UI copy in the designed screens
- Any guarantee of a specific change in activation or setup completion. I can design a better path. What happens in market depends on the build, the rollout, and your customers.

Next step

If Option B looks right, reply and say so. I will send a short confirmation with the kickoff date and a list of what I need for week one. If you want to adjust scope or talk any of this through with your design lead or engineering first, a 30-minute call next week works.