Farhad Safikhani

Senior Product Designer · Complex B2B SaaS · CRM & Fintech · Design Systems · AI Features
Vancouver, BC | farhad@safikhani.com | 604-790-5949
Portfolio: safikhani.com | LinkedIn: linkedin.com/in/farhad-safikhani

SUMMARY

Senior Product Designer with 7 years of end-to-end product design in complex SaaS, the last 5 as the solo designer of a CRM for financial advisors across Web, Mobile, and Outlook. I question the stated request to find the underlying user need, bring design into strategy with Product and Engineering before requirements arrive, and protect the shipped experience through rigorous design QA and real behavioral data. I design AI features that keep the user in control, and I use AI tools to move from problem framing to working prototypes quickly. A prior 15-year career in 3D animation, AR, and storytelling grounds my interaction and visual craft.

SELECTED IMPACT

- **Product turnaround:** Led design through a five-year CRM modernization during which the product added 4,600 seats, NPS rose from about 8.6 to 33.6, and churn fell from about 12% to 8.8%.
- **Adoption:** Global Search reached 68% adoption in its first month, over 90% of users migrated from a legacy module before its deprecation, and UI/UX support tickets fell from 10+ per day to near zero.
- **Retention:** Designed the Outlook add-in that retained ~160 seats across 3 at-risk enterprise accounts.

EXPERIENCE

Product Designer | **Maximizer CRM** · Dec 2021 – Present
Solo designer for a B2B CRM serving financial advisors, partnering directly with the Head of Product and the VP of Engineering. A core driver of 4,600 seats added from 2021 to 2026.

- **Design System and Product Language:** Created the core design system from scratch on Microsoft Fluent and Kendo Angular, adapted it for the Outlook add-in, and extended it to mobile with light and dark themes. One shared foundation keeps the three platforms consistent and on brand. Governed it for 5 years with design tokens, reusable interaction patterns, and product-language rules for messages and errors that sped up engineering delivery.
- **Global Search:** Won sponsorship from the VP of Engineering for a unified Global Search after a back-end test confirmed it was viable. It reached 68% adoption in its first month, so users no longer need to know a record type before searching.
- **Enterprise Retention (Outlook Add-in):** Designed a zero-friction Outlook email-sync add-in on top of the existing proof-of-concept sync engine, adding the features the PM needed and a sync status users can read. It retained ~160 seats across 3 at-risk enterprise accounts. Removed a six-step copy-paste loop between Outlook and the CRM, and designed sync-failure states that let users see what failed and resolve it in one place.
- **Mobile Rebuild:** Secured executive approval to rebuild a failing mobile app: 84% of CRM users had not installed it, and its NPS was -4. Designed one cross-platform app (.NET MAUI) for iOS and Android, re-architected the IA, and cut core actions from 3 taps to 1. The MVP is live in a staged rollout.
- **AI Features (IQ Boost):** Designed AI features now live on web and mobile: one-click Timeline summaries, client summaries that flag key points, natural-language Q&A about clients, image-to-record capture, and notes turned into editable one-tap tasks. Also designed two features not yet shipped: voice notes, and meeting capture that turns a transcript into notes and next actions. The AI suggests; the advisor reviews, edits, and accepts. These features supported new-account sales and retention.
- **Legacy Modernization and UX Debt:** Merged 4 disparate views into a single filterable Timeline, with a generic logging structure for integrations and a table-view toggle for tenured power users. Redesigned the legacy "Hotlist" into "Tasks": over 90% of users migrated before deprecation, and total usage rose 12% above original levels. Eliminated UX debt, cutting UI/UX support tickets from 10+ per day to near zero and shifting user feedback to advanced feature requests.
- **Wealth Data Modules and Integrations:** Co-defined Investment and Insurance data modules, with drill-in analytics dashboards, from research with senior advisors and brokers. Built interactive prototypes with AI tools so advisors could simulate daily work, and won roadmap approval for both. Designed a scalable integration framework for custodians and data lakes (3 major custodians, 2 direct-only integrations), plus KYC workflows showing where each client sits in a multi-step process. Easy setup helped sales win the first 3 branches of a major Canadian wealth and insurance firm that approved 3 CRMs.
- **0-to-1 Email Marketing:** Led end-to-end UX for an email-marketing suite (campaign and template builders, drip automation, compliance), with the MVP now in implementation. Its audit experience was independently rated superior to HubSpot, SendGrid, and Pardot by a Salesforce specialist.
- **Research, Discovery, and AI-Assisted Practice:** Ran usability rounds of about 5 users each, staged from internal team to clients and business partners, followed by dogfooding before release. Tracked post-launch flows in Amplitude and Google Analytics, and surveyed Amplitude cohorts through Userflow (previously Pendo) to guide prioritization. Saved a 2-month engineering build by uncovering a key customer's root problem and directing them to the existing Workflows module. Paired Claude Design and Claude Code with traditional UX methods, audited every generated screen for hallucinated elements and design-system drift, and finalized the UI to standards before handoff. Created internal automation tools with Claude Code.

- **Accessibility, Critique, and Mentorship:** Partnered directly with a low-vision client to remove interface barriers, and designed two WCAG AA type scales for readers with dyslexia. Ran design critiques, pitched design direction to senior leadership, and mentored a design intern into a full-time Junior Product Designer.

Freelance Brand and Visual Designer | **Craftify.ai** · 2025
Early-stage AI startup in Vancouver.
- **Visual Identity:** Designed the logo, helped establish the brand, and applied it to the investor deck and launch materials.

UX/UI Designer | **Yocale** · Oct 2019 – Nov 2021
Two-sided (B2B and B2C) online booking platform for small businesses and their clients.
- **Market Expansion:** Co-designed a custom form builder with on-diagram annotation. Auto shops used it at intake to mark damage and refute false claims. It opened two new verticals: 6 clinic/chiropractic and 20+ automotive accounts.
- **Self-Serve Billing:** Designed the plans page and self-serve subscription flow, so customers renew without a support call.
- **HIPAA-Compliant Design:** Made the platform's design HIPAA-compliant for its doctor and chiropractor users.
- **Discovery and Critique:** Ran user interviews, workplace visits, competitive research, and timed task-based prototype tests, translating findings into requirements with Product Management. Ran design critiques for a team of three.

Interaction Designer / 3D Artist | **Outdoor Factory (Istanbul, Turkey)** · Nov 2017 – Sep 2019
Interactive experiences for museums and theme parks.
- **Immersive UX:** Designed Augmented Reality (AR) experiences that extended physical exhibits. Mapped end-to-end visitor journeys and delivered AR applications, interactive installations, and 3D visualizations.

3D Artist / Scene and Layout Supervisor | **Various Studios** · 2004 – 2017
- **Leadership:** Supervised scene layout for an animated film, leading production teams of up to 10.
- **Freelance Design:** Book layouts, company journals, and an illustrated children's book on the 2007 White Ravens list.

SKILLS

- **Product Strategy:** Discovery, Problem Definition, MVP Scoping, Roadmap Influence, Complex Workflows.
- **Design:** Interaction Design, Visual Design, Prototyping, Information Architecture, Design Systems & Governance, Design Tokens, Product Language, Light and Dark Theming, Dashboards, Accessibility (WCAG AA), HIPAA-Compliant Design.
- **AI:** AI Feature Design, Human Oversight Patterns, AI-Assisted Prototyping, Evaluating and Refining Generated UI.
- **Research and Delivery:** User Interviews, Usability Testing, Workplace Visits, Task-Based Prototype Testing, Support-Pattern Analysis, Design QA, Design Critique, Mentoring.
- **Tools:** Figma, Figma Make, Claude Design, Claude Code, Amplitude, Userflow, Pendo, Google Analytics, Notion, Adobe Creative Suite. 3D/AR: Maya, Blender, 3ds Max, Unity, Vuforia.

EDUCATION

Bachelor's Degree, Visual Communication · 2004