

Li (Lily) Liu

Product Designer

5+ years across B2B SaaS, private markets, fintech, e-commerce, and healthtech, specializing in complex workflows and data-intensive interfaces. Experience includes shipped private-credit capabilities, responsive online and branch banking, AI workflow exploration, and fully remote collaboration.

CONTACT

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EXPERIENCE

PactFi (Private Markets/B2B SaaS) | Product Designer

Apr 2025 - Aug 2026

- Led end-to-end design for Signature Blocks and Internal and External Custodian Reporting through launch and iteration; PMs shared client feedback that reporting saved time and reduced email coordination.
- Chose an editable table over sequential forms for cross-entity review of roles, signatories, and manager relationships, with confirmations protecting individual selections during bulk updates.
- Designed template-driven reporting that reused transaction data and combined entity-specific configuration, attachments, previews, and distribution in one workflow.
- Supported validation and implementation with Product, Engineering, and QA, clarifying truncation and numeric chips with hover access to full lists. Helped peers resolve problems in weekly design syncs.
- Began secondary-transfer AI-agent discovery and contributed to two hackathon prototypes: bringing fragmented external data into PactFi and generating reports through agentic chat using platform data, including report formatting and PowerPoint export.
- Collaborated on Secondary Transfers and enhanced Parent Funds and other transaction workflows involving connected information, permissions, and actions.

Captain (E-Commerce) | UX/UI Designer

Mar 2024 - Jul 2024

- Redesigned AI concierge and sign-up flows; alongside targeted social ads and dedicated landing pages, cost per sign-up fell from \$150 to \$7.
- Simplified discovery with guided recommendations and pre-curated kits, iterating on cross-functional feedback.

Savana Inc. (Fintech) | UX/UI Designer

Dec 2021 - Feb 2024

- Led Battle Bank's online account-opening design across personal, business, retirement, and trust products; in usability testing, a new user completed a personal-account application in approximately four minutes, 27% faster than competitor flows tested by our team.
- Delivered production-ready Woodforest National Bank designs for branch account opening across multiple customers and products, including multi-titling, reusable customer information, hardware-integrated ID capture, and consolidated documents and signatures.
- Partnered with Product, Engineering, banking specialists, clients, and a system architect to translate complex account structures, regulatory requirements, client needs, and technical constraints into clear workflows.
- Contributed to the design system and designed responsive banking experiences aligned with WCAG 2.1 requirements.

BravoCare (Healthtech) | UX/UI Designer

May 2021 - Nov 2021

- Created Figma prototypes and conducted five usability sessions for mobile healthcare staffing, using pay-rate and commute-distance findings to refine how clinicians found and evaluated shifts.

Payveris (Fintech) UX/UI Designer	May 2021 - Dec 2021
• Mapped bill-payment flows for multiple user archetypes and iterated on new-feature screens.	
MediaRadar (Advertising) UX/UI Designer	Jun 2021 - Aug 2021
• Iterated on reporting and data-analysis screens.	

SKILLS

Product and Interaction Design

Complex workflows, data-intensive interfaces, user-centered design, interaction design, design systems, responsive design, accessibility, wireframing, prototyping

Research, Collaboration, and AI

User research, usability testing, workflow mapping, cross-functional collaboration, stakeholder engagement, design critiques, implementation QA; AI-assisted research synthesis, workflow exploration, UX writing, and interactive prototyping

Tools

Figma, Figma Make, Claude, ChatGPT, Jira, Zeplin, InVision, Framer, HTML/CSS, Sketch

EDUCATION

UX Academy Certificate Designlab	Jan 2021 - Jun 2021
BA in Fashion Merchandising Virginia Commonwealth University	Sept 2013 - May 2017