

Goals Management

Led design and research for Goals Management V1, which empowered individuals to set and track goals and drove performance for organizations.

The image displays the Goals Management software interface across two devices: a desktop browser window and a mobile phone screen.

Desktop Browser View:

- Header:** TALENT MANAGEMENT, Goals, Performance Evaluation.
- Overall Progress:** 45% Overall Progress.
- Goals Completed:** 1 / 5 Goals Completed.
- Last Updated:** 2 days ago.
- Upcoming Touchpoint:** Aug. 28.
- Add New Goal:** Button.
- Performance Goals Section:** Contains four goal cards:
 - In Progress:** Optimize marketing funnel for marketing-qualified leads. Key Results: 4, Weight: 25%, Due: 12/30/2021, Aligned. Progress: 50%.
 - Need Help:** Simplify & clarify our product, messaging, and presentation. Key Results: 4, Weight: 25%. Progress: 50%.
 - Not Started:** Achieve record metrics in all areas of marketing. Key Results: 4, Weight: 25%. Progress: 0%.
 - Completed:** Successfully implement the weekly newsletter. Key Results: 4, Weight: 25%, Assigned by Joseph. Progress: 100%.

Mobile Phone View:

- Header:** Goals, FY 2020.
- Overall Progress:** 45% Overall Progress, How is this calculated?
- Goals Completed:** 1 out of 5, Current Cycle 106 days left.
- Performance Goals Section:** Contains three goal cards:
 - In Progress:** Improve brand presence in North American market. Key Results: 2 | Goal Weight: 30% | Aligned.
 - Not Started:** Improve outbound marketing performance. Key Results: 3 | Goal Weight: 25%. Comment today.
 - In Progress:** Optimize marketing funnel for more.



I'm designing at Lifion on the Talent Squad

Building the next generation HCM platform that
helps organizations and people grow

Team



Product Designer



Product Owner



UX Writer



Design System Designers

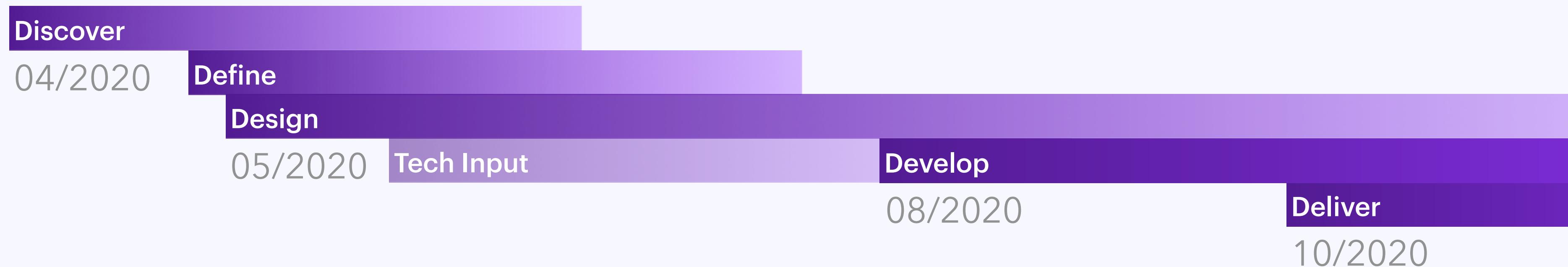
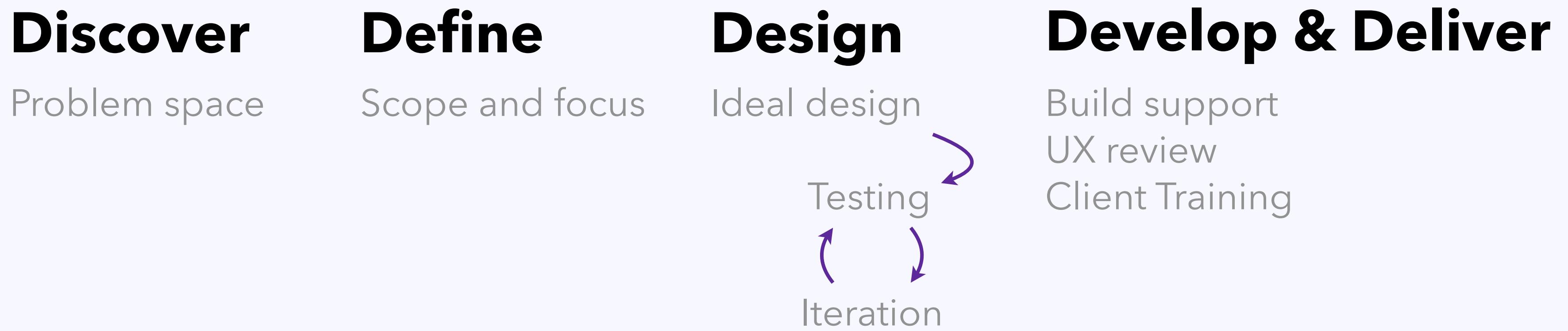


Beacon
our design system



Lifion Developers

Process



Business Objective

Empower organizations to **maintain and grow their talents**

→ Acquire more happy clients that would advocate for Lifion

Trends

Provide high frequency employee self service flows on **mobile**

Users



Employees*



Managers



HR Practitioners

User Needs

As a career builder, I want to be able to **define my goals, and measure my progress**, so that I can give my manager visibility of my growth and contribution.

* referring to clients' employees

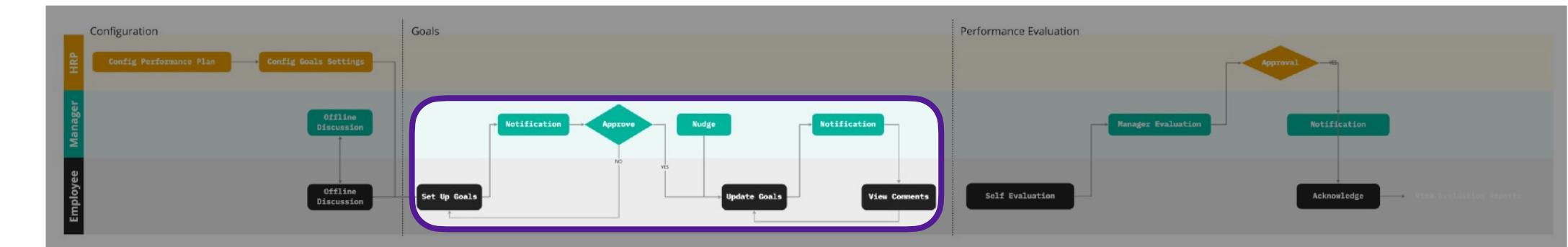


Employees*

Careerbuilder Lynda

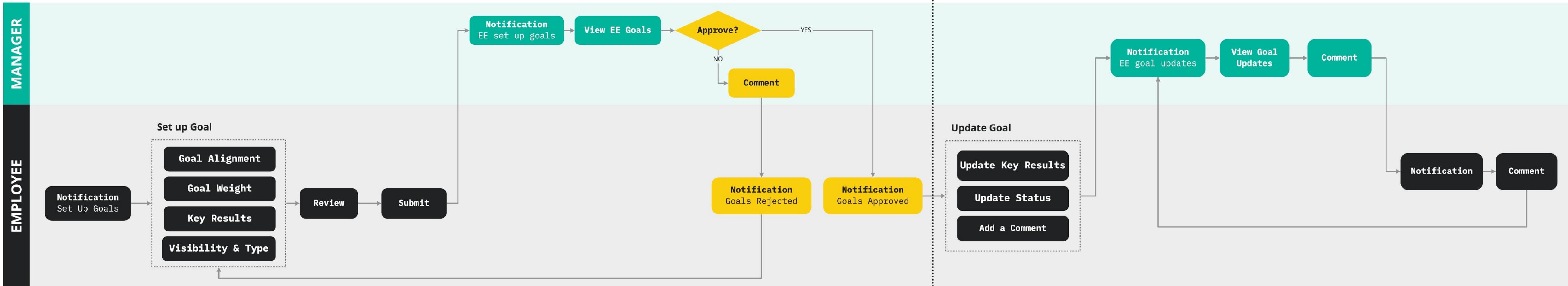
Define V1 Scope

What we must have
What's the foundation



■ Out of V1 ■ Manager V1 ■ Employee V1

Set Up Goals



Define V1 Objective

To build the **foundation** of Lifion Goals Management app, where employees and managers can **set and track their goals**

Define Design Success Metrics

Ease of use (4+)

I thought this system was easy to use

- 1 - Strongly disagree
- 5 - Strongly agree

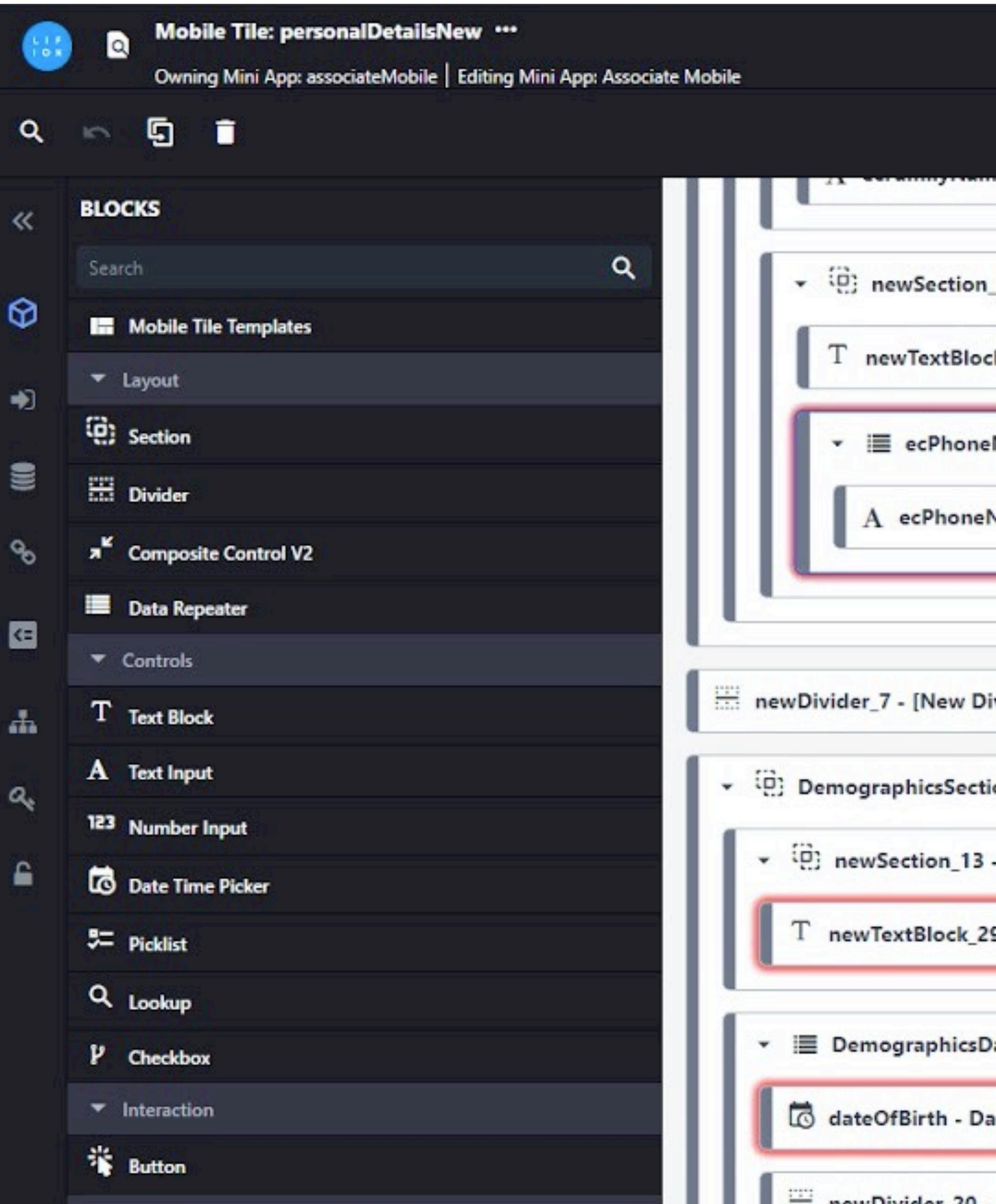
User confidence (4+)

I felt very confident using this system

- 1 - Strongly disagree
- 5 - Strongly agree

Technical Constraints

We have very limited mobile components available in the platform



Exploring a Meaningful Mobile Design Process

3 WEEKS

Ideal Design

Interaction design
No constraints

4 WEEKS

Testing

Loop in
Beacon Designers

5 WEEKS

Design Iteration

Balance constraints & ideal UX
Collaborate w/ Beacon Designers

3 WEEKS

Testing

Validate
UX compromises

1 WEEKS

Detail Design

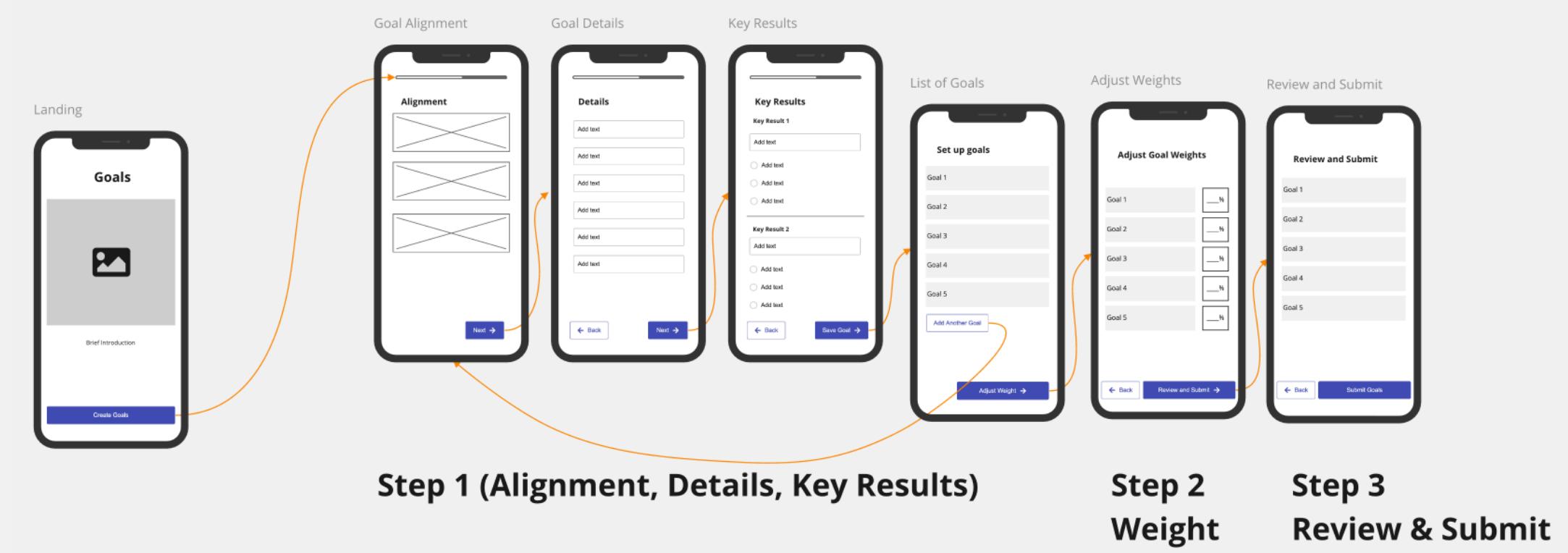
Pixel perfect

Design Challenge

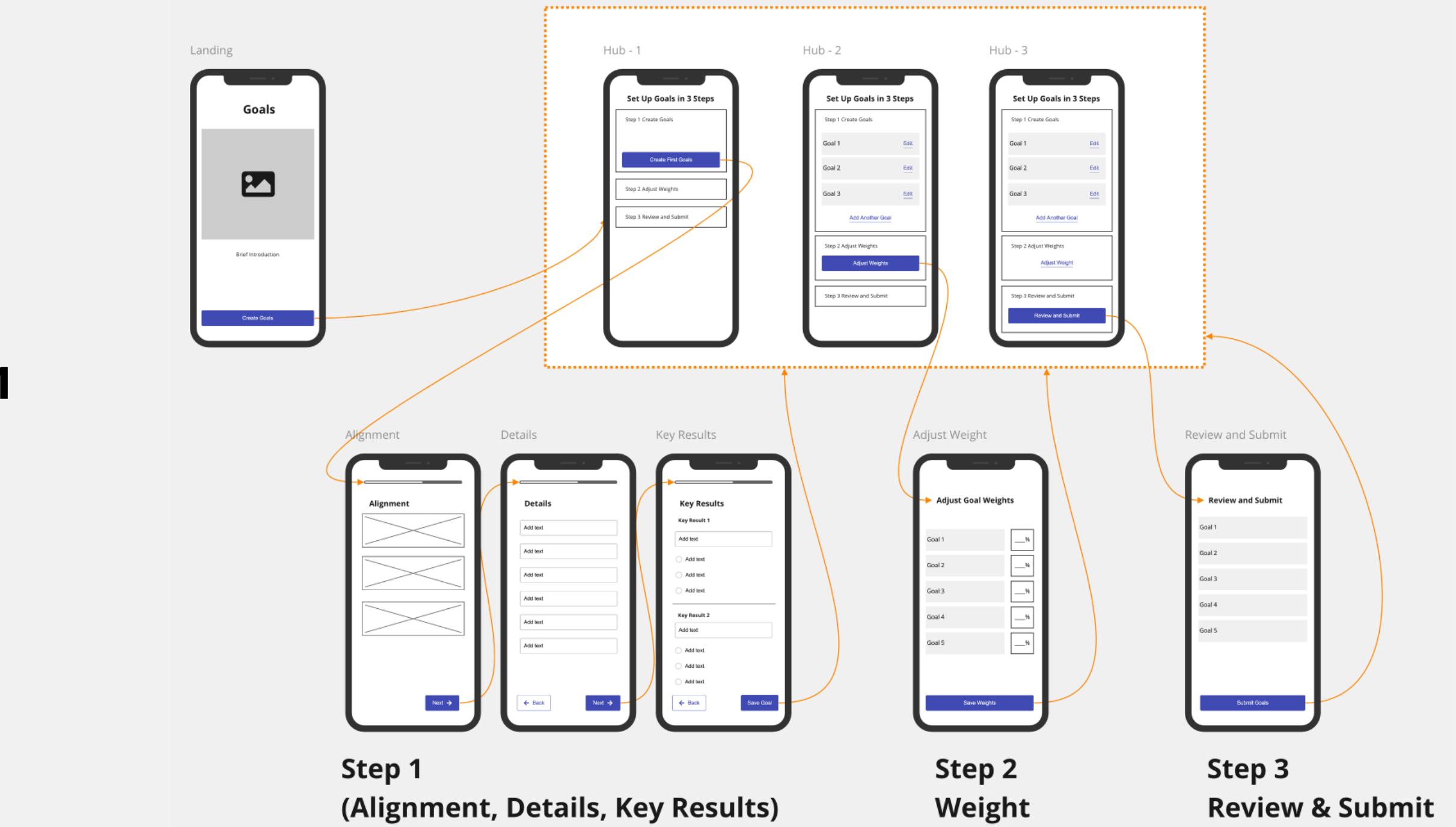
#1

Navigation

Exploration 2 Linear Process



Exploration 1 Hub Screen



The image consists of five screenshots illustrating the goal setting process:

- Step 1: Set Goals**

9:41 Your Goals June 2020 - June 2021

Set Goals

Create Your First Goal

A large orange arrow points from the "Create Your First Goal" button to the "Align to:" section of the next screen.
- Step 2: Align Your Goal**

9:41 Align Your Goal

Aligning your goal helps to highlight your contribution and connect your work to the success of your company

Align to:
Your manager's goals
Joseph Hua Head of Marketing Change

Simplify and clarify our product, messaging, and overall presentation Align

Improve brand presence Align

Optimize marketing funnel for more marketing-qualified leads Align

Understand our customers and analyze their behavior Align

A yellow circle highlights the "Align" button next to the "Improve brand presence" option. A yellow arrow points from this circle to the "Performance Goal" section of the third screen.
- Step 3: Define Your Goal**

9:41 Define Your Goal

Aligned to
Improve brand presence
Joseph Hua

What's your goal?
Improve brand presence in North American market

What type of goal is this?
Aligned goals are always performance goals
Performance Goal Reflected in your performance evaluation

Who can see this goal?
Managers can always see performance goals
Your Manager

A yellow arrow points from the "Performance Goal" section back to the "Define Your Goal" screen.
- Step 4: Add Key Results**

9:41 Add Key Results

Key results help break down a goal into measurable parts.

Key Result 1
Place 5 advertisements in mainstream media

How will this key result be measured?
Amount (checked), Percentage, Complete / Incomplete

Target Amount: 5 Amount Unit: Advertisements

Remove Key Result

Key Result 2
Boost brand recognition by 50%

A yellow arrow points from the "Save Goal" button to the "Add Key Results" screen.
- Step 5: Create Goals**

9:41 Step 1 of 3 Create Goals

Add Another Goal

Performance Goals

Improve brand presence in North American market Edit

Key Results: 2 | Aligned

Adjust Goal Weights

Goals are not submitted yet, please adjust weights before submission

A large orange arrow points from the "Edit" link in the "Performance Goals" section back to the "Set Goals" screen.

9:41

Your Goals

June 2020 - June 2021

Step 1 of 3
Create Goals

Add Another Goal

Performance Goals

Improve brand presence in North American market Edit
Key Results: 2 | Aligned

Improve outbound marketing performance Edit
Key Results: 2

Optimize marketing funnel for more marketing-qualified leads Edit
Key Results: 3

Successfully implement the weekly newsletter Edit
Key Results: 3

Individual Goals

Complete an online course of Spanish Speaking Edit
Key Results: 2

Goals are not submitted yet,
please adjust weights before submission

Adjust Goal Weights →

9:41

Your Goals

June 2020 - June 2021

Step 2 of 3
Adjust Goal Weights

Goal weights determine the goals' impact on performance evaluation

Performance Goals

Improve brand presence in North American market %
Key Results: 2 | Aligned

Improve outbound marketing performance %
Key Results: 2

Optimize marketing funnel for more marketing-qualified leads %
Key Results: 3

Successfully implement the weekly newsletter %
Key Results: 3

Individual Goals

1 ABC
2 DEF
3 GHI
4 JKL
5 MNO
6 PQR
7 STU
8 WXYZ
9 .
0 X

9:41

Your Goals

June 2020 - June 2021

Step 3 of 3
Review & Submit

Performance Goals

Improve brand presence in North American market
Key Results: 2 | Goal Weight: 30% | Aligned

Improve outbound marketing performance
Key Results: 2 | Goal Weight: 25%

Optimize marketing funnel for more marketing-qualified leads
Key Results: 3 | Goal Weight: 25%

Successfully implement the weekly newsletter
Key Results: 3 | Goal Weight: 20%

Individual Goals

Complete an online course of Spanish Speaking
Key Results: 1 | No Weight

← Previous Submit Goals

9:41

X

You've successfully submitted your goals!

Start to update and track your goals!

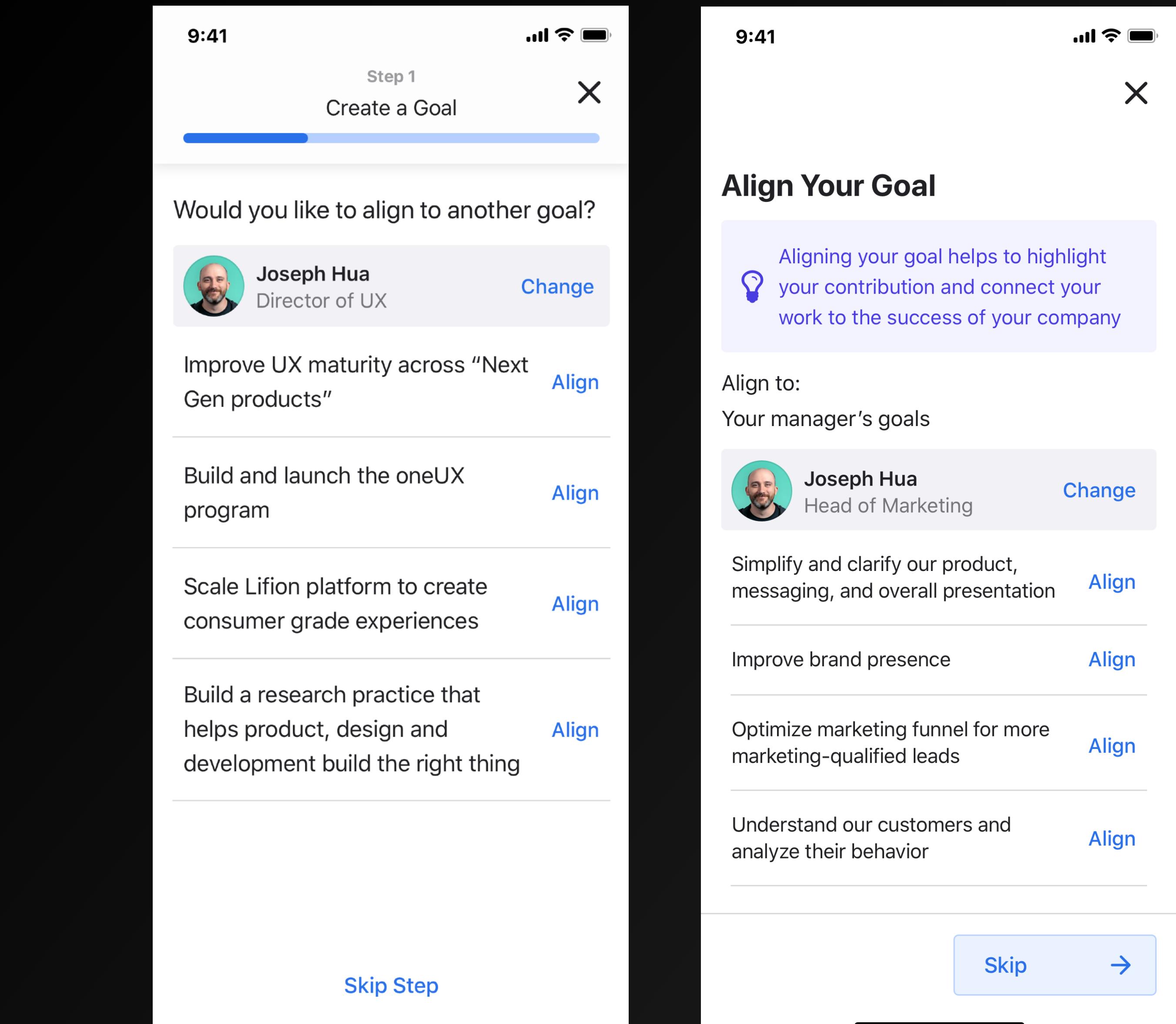
View Your Goals

Design Challenge

#2

Educate users about new concepts

Sprinkled purple tips through the process of setting goals to introduce new concepts



Initial Design

Final Design

Design Challenge

#2

Educate users about new concepts

Sprinkled purple tips through the process of setting goals to introduce new concepts

The image displays three screenshots of a mobile application interface for goal setting, illustrating a user flow from goal alignment to performance tracking.

- Step 1: Align Your Goal**

This screen shows the user aligning their goal with their manager's goals. It includes a tip about aligning goals, a section to align to "Your manager's goals" (set to "Joseph Hua, Head of Marketing"), and a list of five items to align with:
 - Simplify and clarify our product, messaging, and overall presentation
 - Improve brand presence
 - Optimize marketing funnel for more marketing-qualified leads
 - Understand our customers and analyze their behaviorEach item has an "Align" button next to it. At the bottom are "Skip" and "Save Goal" buttons.
- Step 2: Add Key Results**

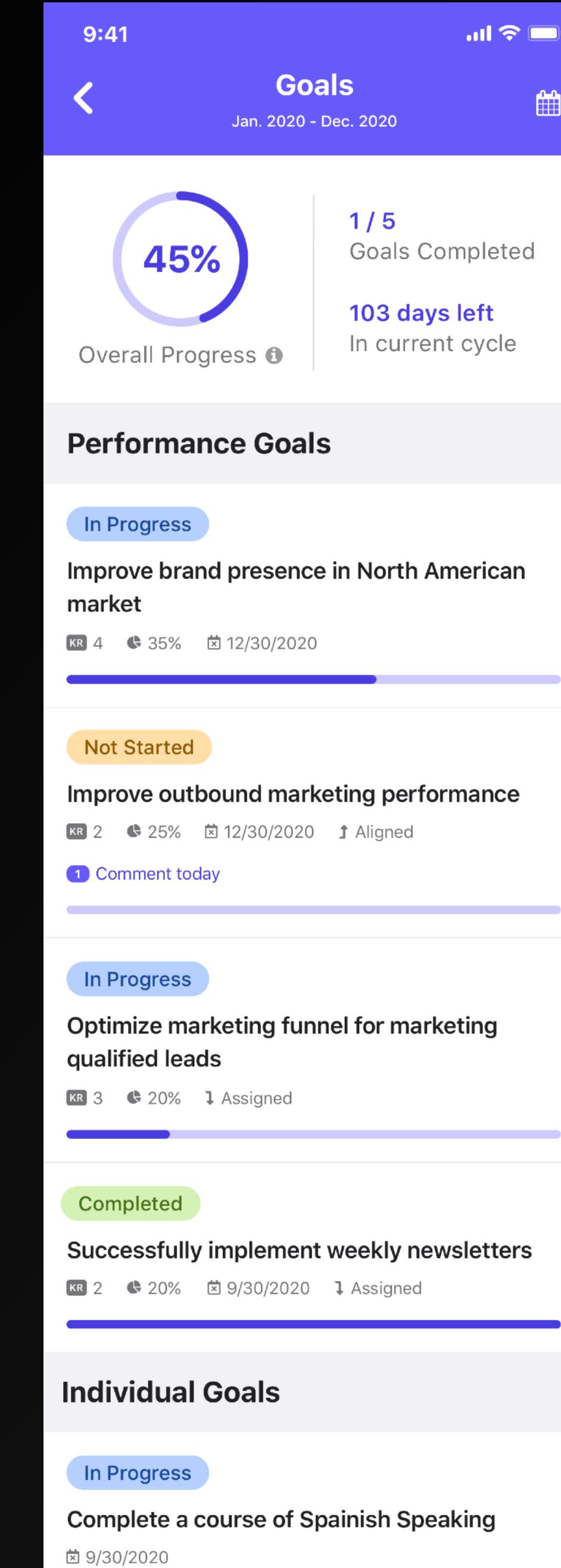
This screen shows the user adding key results to their goal. It includes a tip about key results being measurable parts, a section for "Key Result 1" (set to "Place 5 advertisements in mainstream media"), and a section to measure the key result:
 - Amount (selected)
 - Percentage
 - Complete / IncompleteBelow this are fields for "Target Amount" (5) and "Amount Unit" (Advertisements). At the bottom are "Previous" and "Save Goal" buttons.
- Step 3: Your Goals**

This screen shows the user's goal list for the period "June 2020 - June 2021". It includes:
 - Step 2 of 3**
 - Adjust Goal Weights**: A tip about goal weights determining impact.
 - Performance Goals**: Two listed goals:
 - Improve brand presence in North American market: Key Results: 2 | Aligned (with a checkbox and percentage icon)
 - Improve outbound marketing performance: Key Results: 2 (with a checkbox and percentage icon)
 - A numeric keypad for entering weights (1-9, ., 0, backspace).

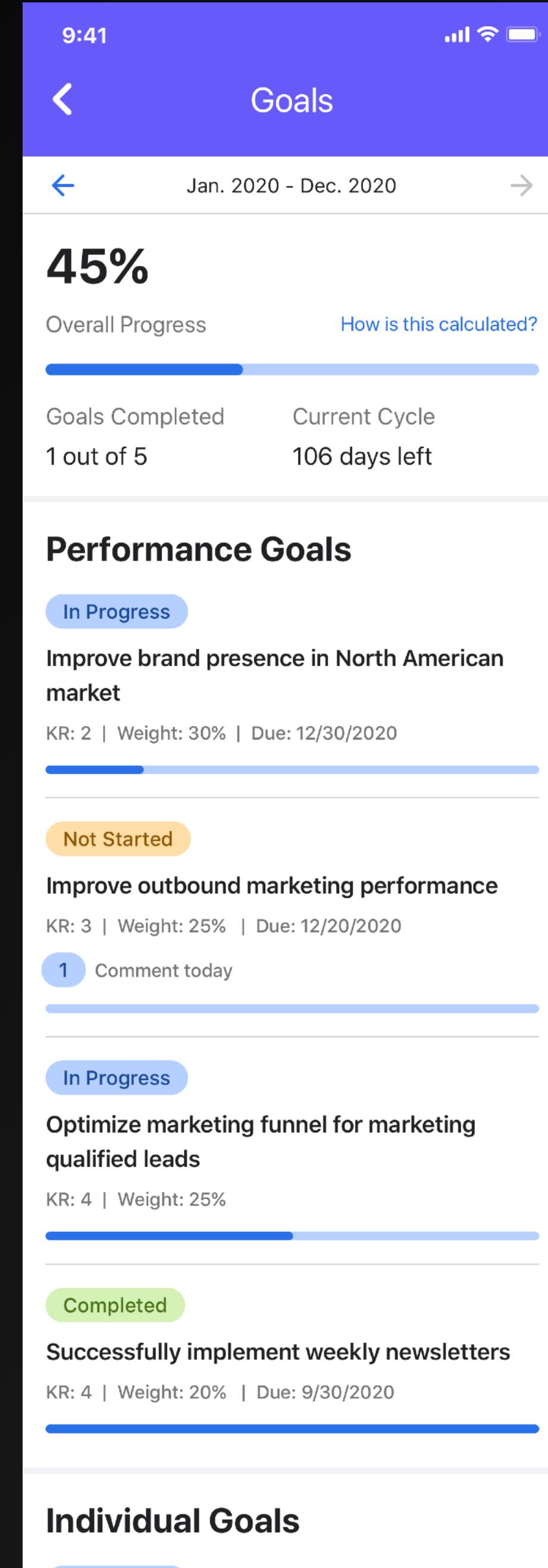
Design Challenge

#3

Balance constraints and
good user experience



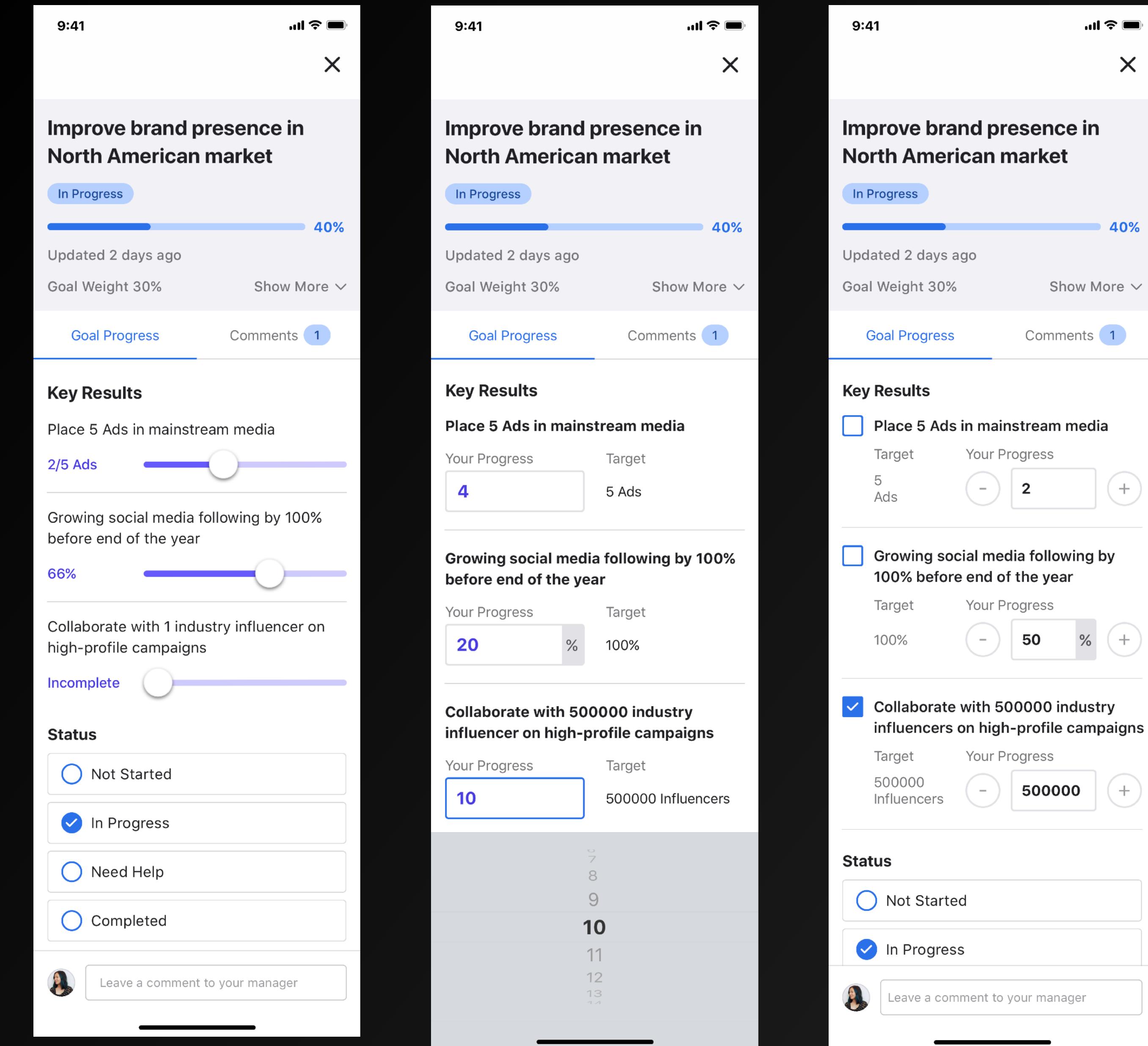
Initial Design



Final Design

Design Challenge

#3
Balance constraints and
good user experience



Initial Design

Final Design

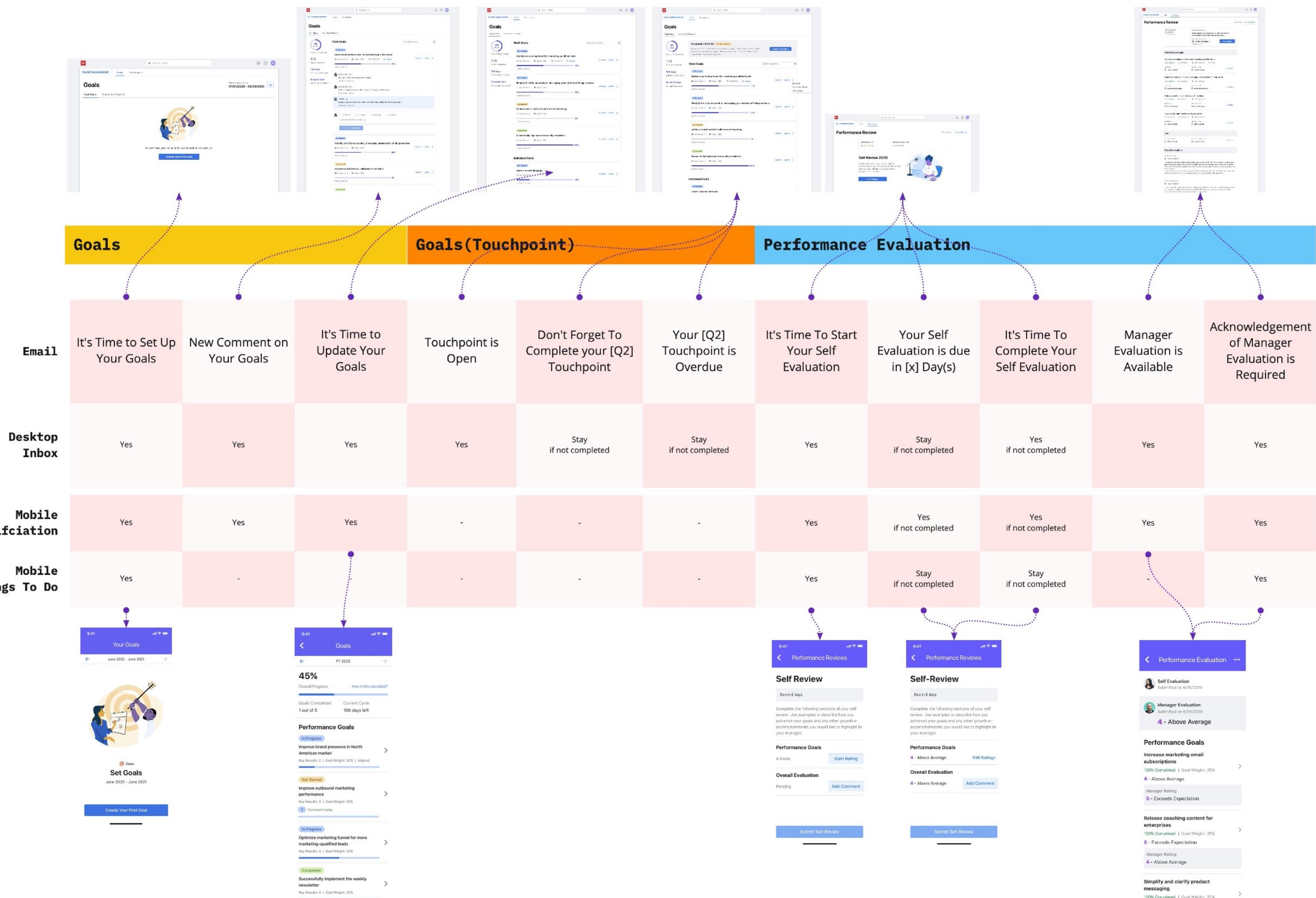
Design Challenge

#4

Design a Holistic Experience

Goals vs. entire HR ecosystem

Notification design



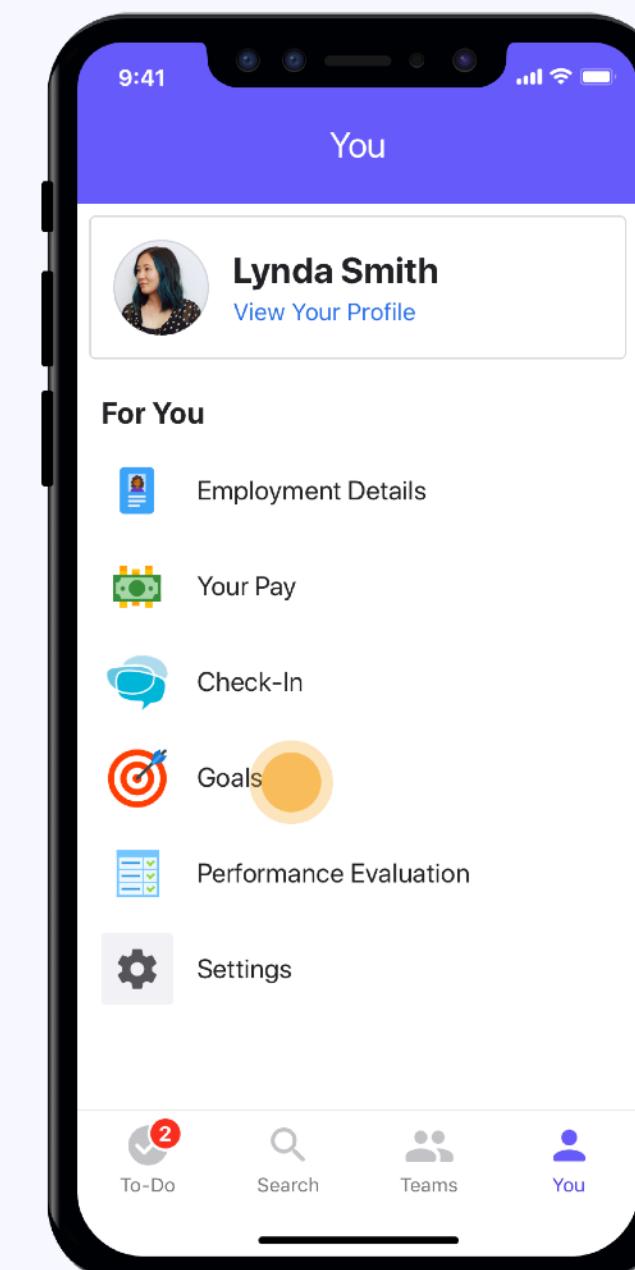
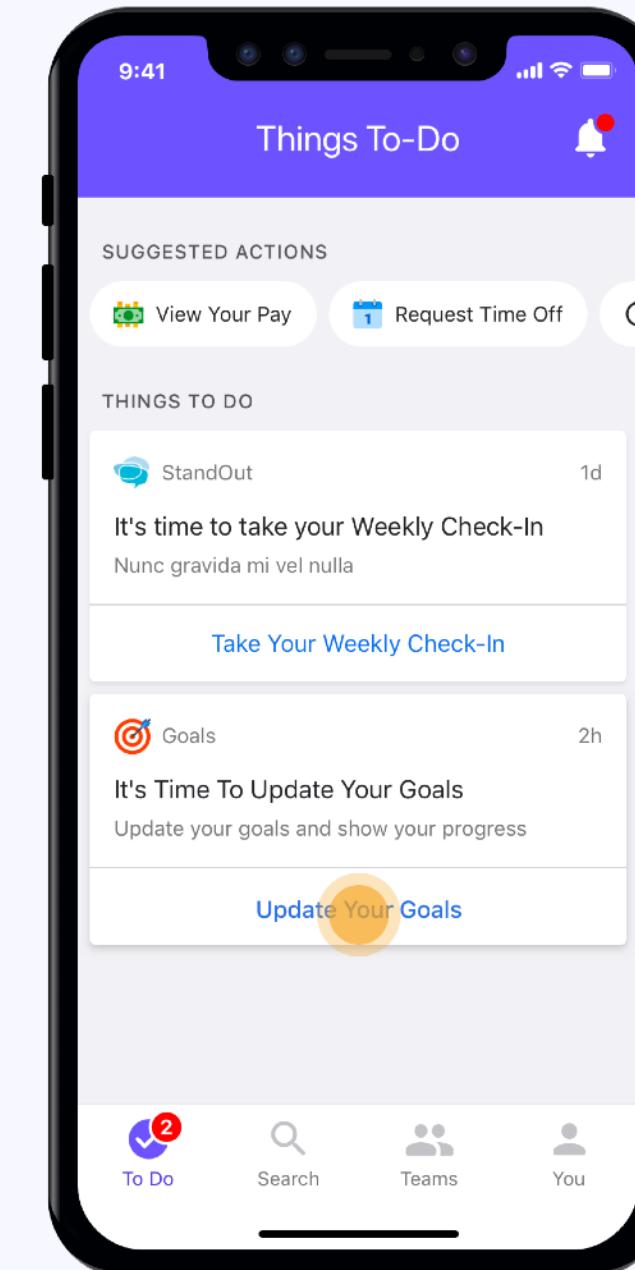
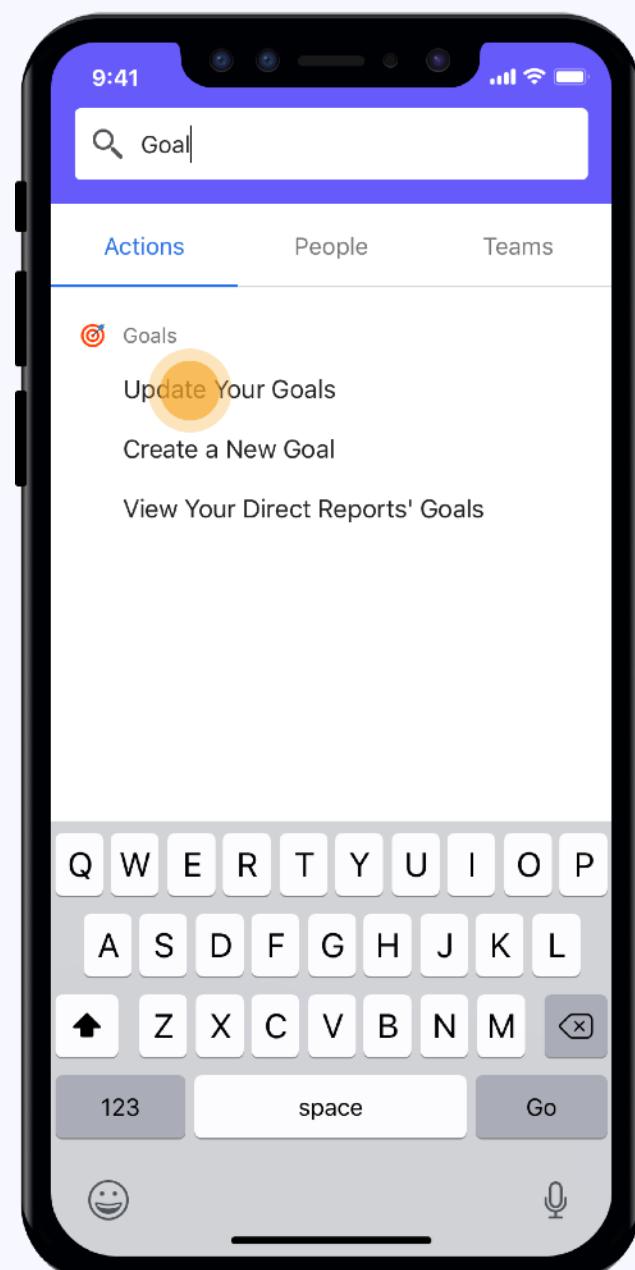
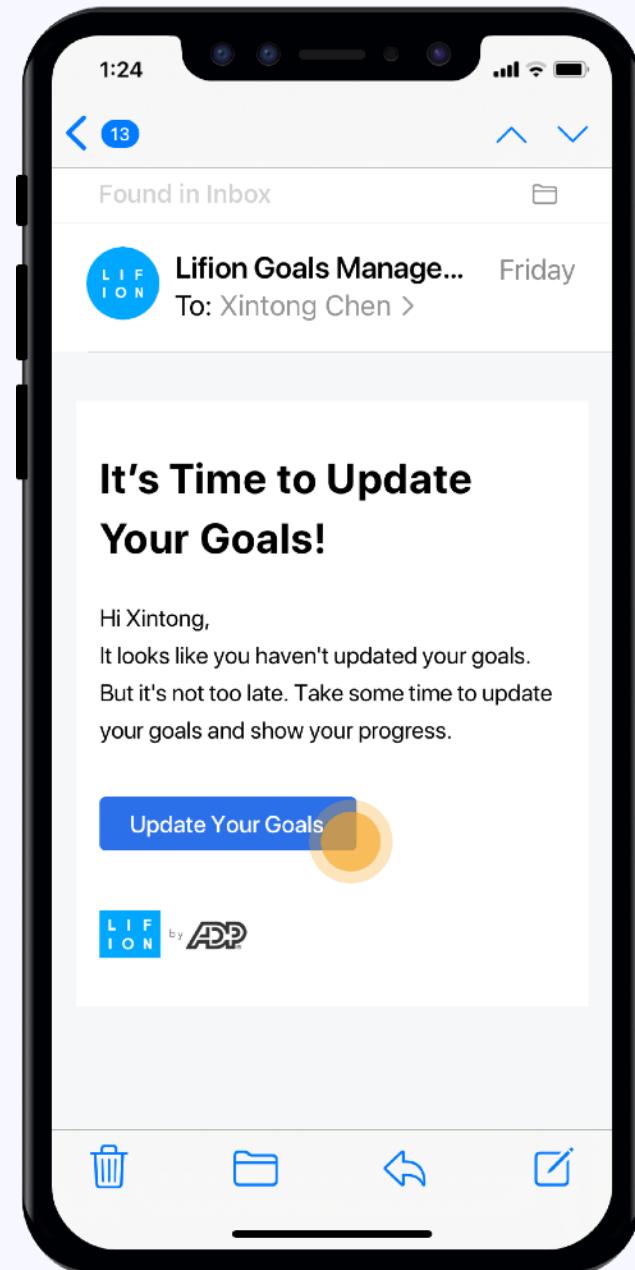
Design Challenge

#4

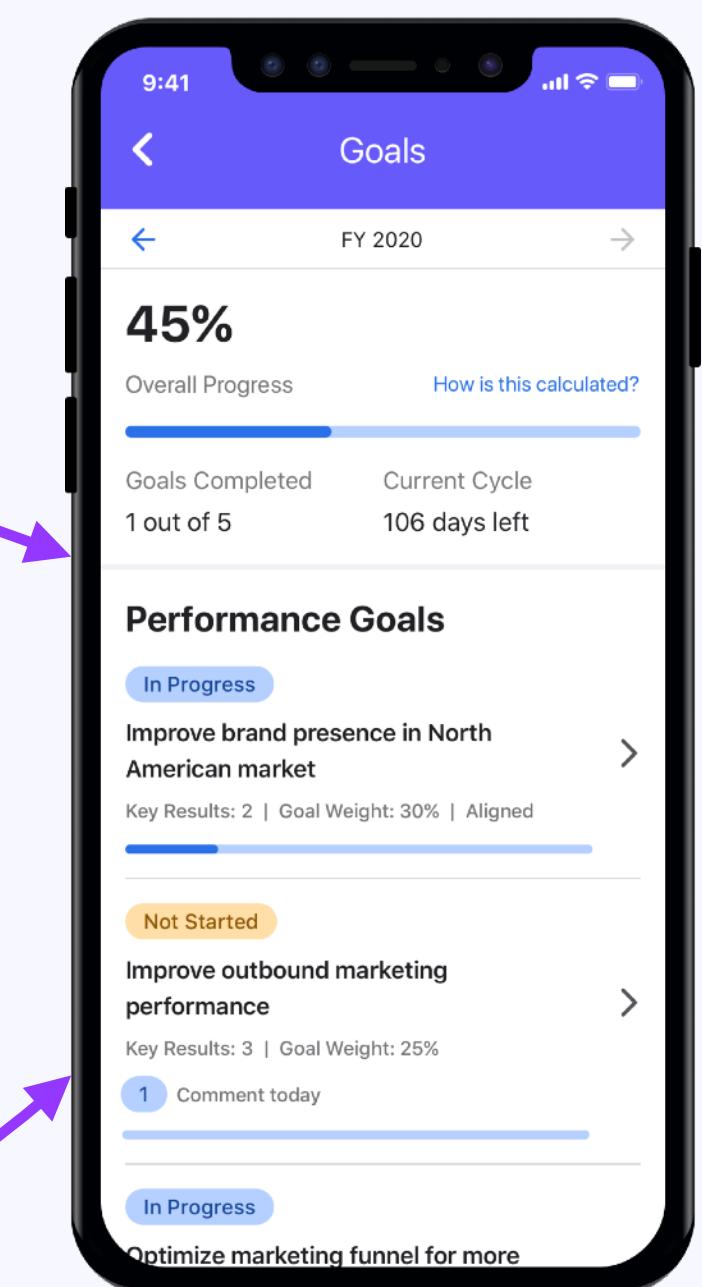
Design a Holistic Experience

Unmotivated
Employees
(notifications)

Motivated
Employees
(search, profile)



Goals Management
landing page



Collaborated with UX Writer

It's Time for [Q2 Touchpoint]

Hi [EE Name],

Please make sure all your goals are updated in the next [7] days.

Touchpoint is a structured way for you and your manager to keep things on track. It allows you to review the status of your goals and either update the key results, or leave a comment on your progress. You can also provide feedback to your manager. If you need help on any goals, make sure you bring it up to your manager during the touchpoint.

Update Goals for Q2 Touchpoint

Jack

10d

Might want to take a second pass on this sentence.
"Unblock" is very specific terminology. Is there a better way to phrase this?

xintong

9d

@Jack how about "Please help your direct reports to bring things back on track by leaving a comment to" or "If you see anything off track, please help your direct reports by leaving a comment to"

Jack

9d

Hmm, what do you think of: "Help support your direct reports by providing feedback on their goals or reaching out to them directly."

xintong

9d

I like it!

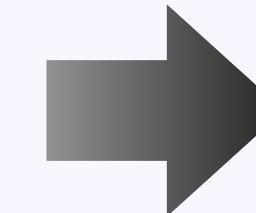
Ease of use (4+)

I thought this system was easy to use

1 - Strongly disagree

5 - Strongly agree

4.21



4.38

Design Success

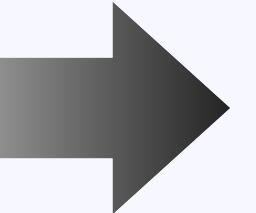
User confidence (4+)

I felt very confident using this system

1 - Strongly disagree

5 - Strongly agree

4.03



4.25

Desktop Experience

The screenshot shows a modal dialog titled "Align Your Goal" over a dark background. The dialog has a light gray header bar with "Step 1 of 3" and the title. Below the title is a purple info box with a lightbulb icon and the text: "Aligning your goal helps to highlight your contribution and connect your work to the success of your company". There are three radio buttons below: "Align to an Associate" (selected), "Align to a Company Goal", and "Don't Need Alignment". A section for "Your Manager" shows a profile picture of Joseph Hua, his title as Director of Marketing, and a "Change" button. Below this are five items with "Align" buttons: "Simplify and clarify our product, messaging, and overall presentation", "Optimize marketing funnel for more marketing-qualified leads", "Improve outbound marketing performance", and "Activate user-testing of our content". At the bottom are "Cancel" and "Next" buttons.

The screenshot shows the "Set Up Your Goals" page. At the top is a purple info box with a lightbulb icon and the text: "Please adjust weights for performance goals before submitting. Goal weights determine the impact of a goal on performance evaluation". Below this is a section titled "Performance Goals" with a table:

Goal Description	Weight	Action
Successfully implement the weekly newsletter	15 %	Edit Remove
Achieve record metrics in all areas of marketing	15 %	Edit Remove
Simplify & clarify our product, messaging, and presentations	15 %	Edit Remove
Improve customer satisfaction rating	20 %	Suggested Weight: 20%

Below the table is a yellow warning box with a triangle icon and the text: "Total weight should add up to 100%." with a value of "65 %". At the bottom are "Individual Goals" sections with "Add Another Goal" and "Submit Your Goals" buttons.

Desktop Experience

The screenshot shows the 'Goals' section of the Lifion desktop application. At the top, there's a navigation bar with 'TALENT MANAGEMENT', 'Goals' (which is selected), and 'Performance Evaluation'. A search bar says 'Search Lifion' and there are user icons.

Goals

Your Goals Your Direct Reports

Performance Goals

Overall Progress: 45 Percent

In Progress

Optimize marketing funnel for marketing-qualified leads

1/5 Goals Completed | 2 days ago Last Updated | Aug. 28 2020 Upcoming Touchpoint

Key Results: 4 | Weight: 25% | Due: 12/30/2021 | Aligned

Progress: 50% (Updated 2 days ago)

Comment Update

Need Help

Simplify & clarify our product, messaging, and presentation

1/5 Goals Completed | 2 days ago Last Updated | Aug. 28 2020 Upcoming Touchpoint

Key Results: 4 | Weight: 25%

Progress: 50% (Updated 2 days ago)

Not Started

Achieve record metrics in all areas of marketing

1/5 Goals Completed | 2 days ago Last Updated | Aug. 28 2020 Upcoming Touchpoint

Key Results: 4 | Weight: 25%

Progress: 0% (Updated 2 days ago)

Completed

Successfully implement the weekly newsletter

1/5 Goals Completed | 2 days ago Last Updated | Aug. 28 2020 Upcoming Touchpoint

Key Results: 4 | Weight: 25% | Assigned by Joseph

Progress: 100% (Updated 01/01/2020)

Add New Goal

The screenshot shows the 'Goals' section with an update dialog open over the 'Simplify & clarify our product, messaging, and presentation' goal.

Goals

Your Goals Your Direct Reports

Performance Goals

Overall Progress: 45 Percent

In Progress

Optimize marketing funnel for marketing-qualified leads

1/5 Goals Completed | 2 days ago Last Updated | Aug. 28 2020 Upcoming Touchpoint

Key Results: 4 | Weight: 25% | Due: 12/30/2021 | Aligned

Progress: 50% (Updated 2 days ago)

Update Key Results

Finalize the content strategy, key messages and topic structure for next 6 months

Grow subscriber base at least 5% per week to get to 50000 readers / 10000 / 50000 Readers

Increase the CTR% to 4% / 4 / 4 CTR%

Update Status

Not Started | In Progress | Need Help | Completed

We just had a restructuring on the research team and lost our dedicated researcher. We are reevaluating priorities and might not meet the evaluative studies result this quarter.

Update Your Goal **Cancel**

Need Help

Simplify & clarify our product, messaging, and presentation

1/5 Goals Completed | 2 days ago Last Updated | Aug. 28 2020 Upcoming Touchpoint

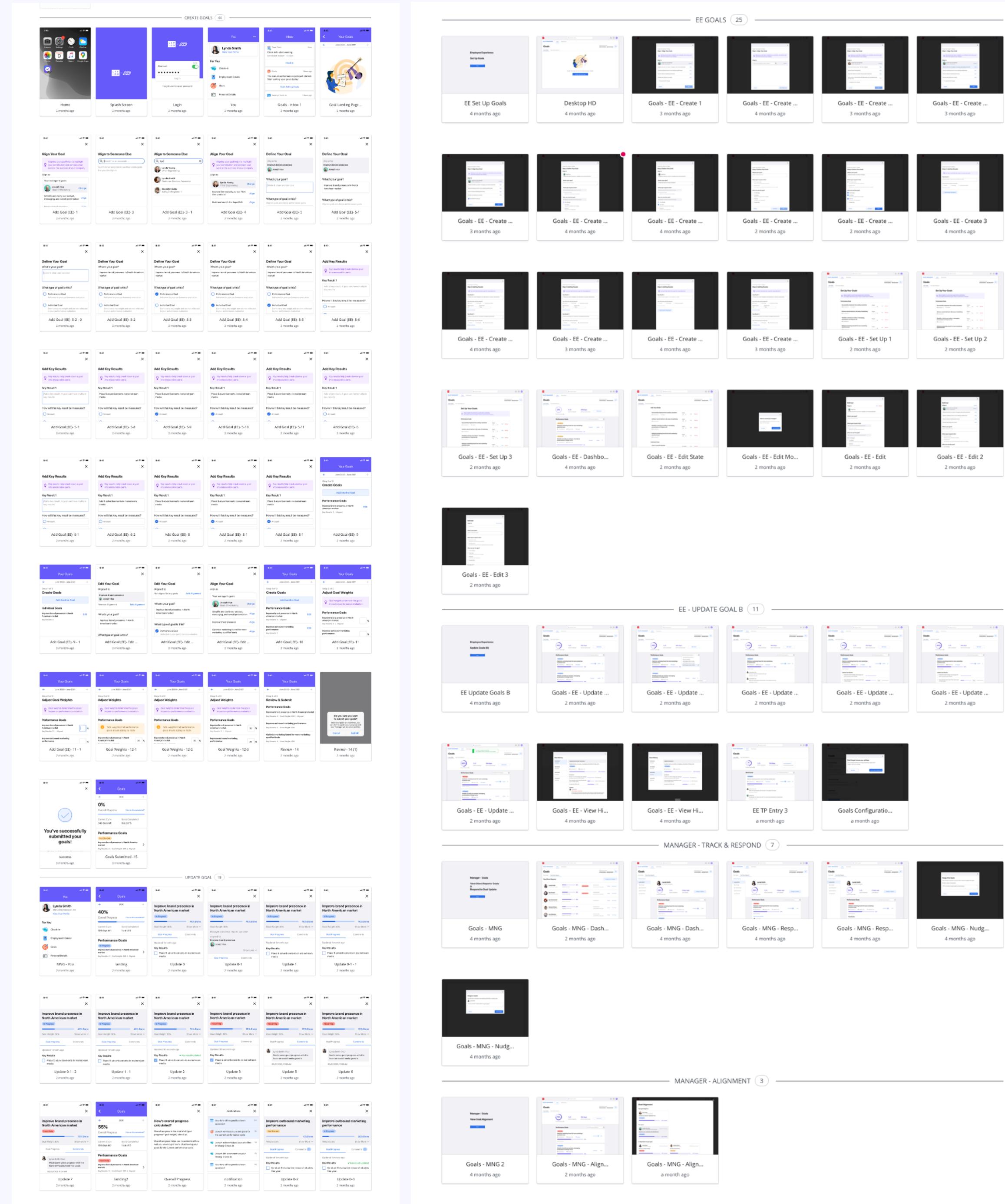
Key Results: 4 | Weight: 25%

Develop Deliver

Desktop V1
Launched in 10/2020

Mobile V1
Aiming at 3/2021

Designing V2 features



Thank You!

That was my story of leading design and research for Goals
Management V1 from discovery to delivery

<http://xintongchen.github.io>