

# Goals Management

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

The image shows the Goals Management 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 Percent (blue circle).
- Goals Completed:** 1 / 5.
- Left in Current Cycle:** 104 days.
- Upcoming Touchpoint:** 3 months later.
- Add New Goal:** Button.
- Performance Goals:** A list of four goals with progress bars:
  - Optimize marketing funnel for marketing-qualified leads:** In Progress, 50% complete.
  - Simplify & clarify our product, messaging, presentation of things we have:** Need Help, 50% complete.
  - Achieve record metrics in all areas of marketing:** Not Started, 0% complete.
  - Successfully implement the weekly newsletter:** Completed, Assigned by Joseph.

**Mobile Phone View:**

- Overall Progress:** 45%.
- Goals Completed:** 1 out of 5.
- Current Cycle:** 106 days left.
- Performance Goals:** A list of three goals with progress bars:
  - Improve brand presence in North American market:** In Progress, 0% complete.
  - Improve outbound marketing performance:** Not Started, 0% complete.
  - Optimize marketing funnel for more:** In Progress, 0% complete.



I'm designing at Lifion on the Talent squad

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

# My Team My Role



Product Designer



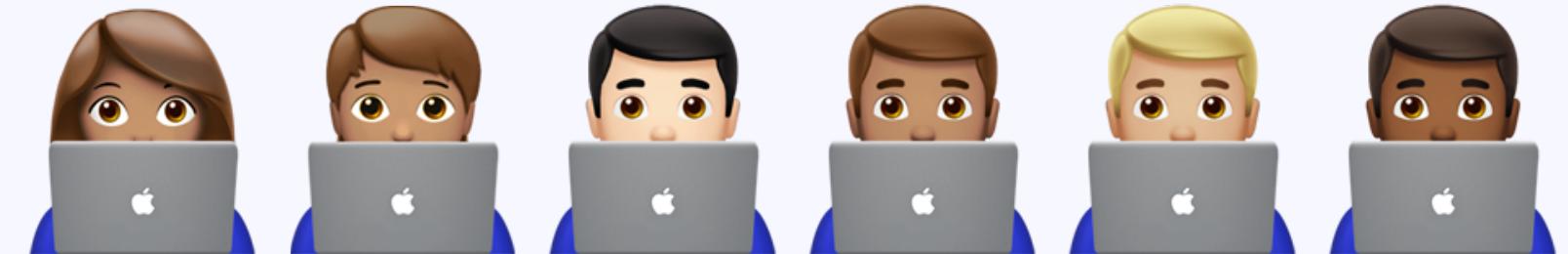
Product Owner



UX Writer



Design System Designers

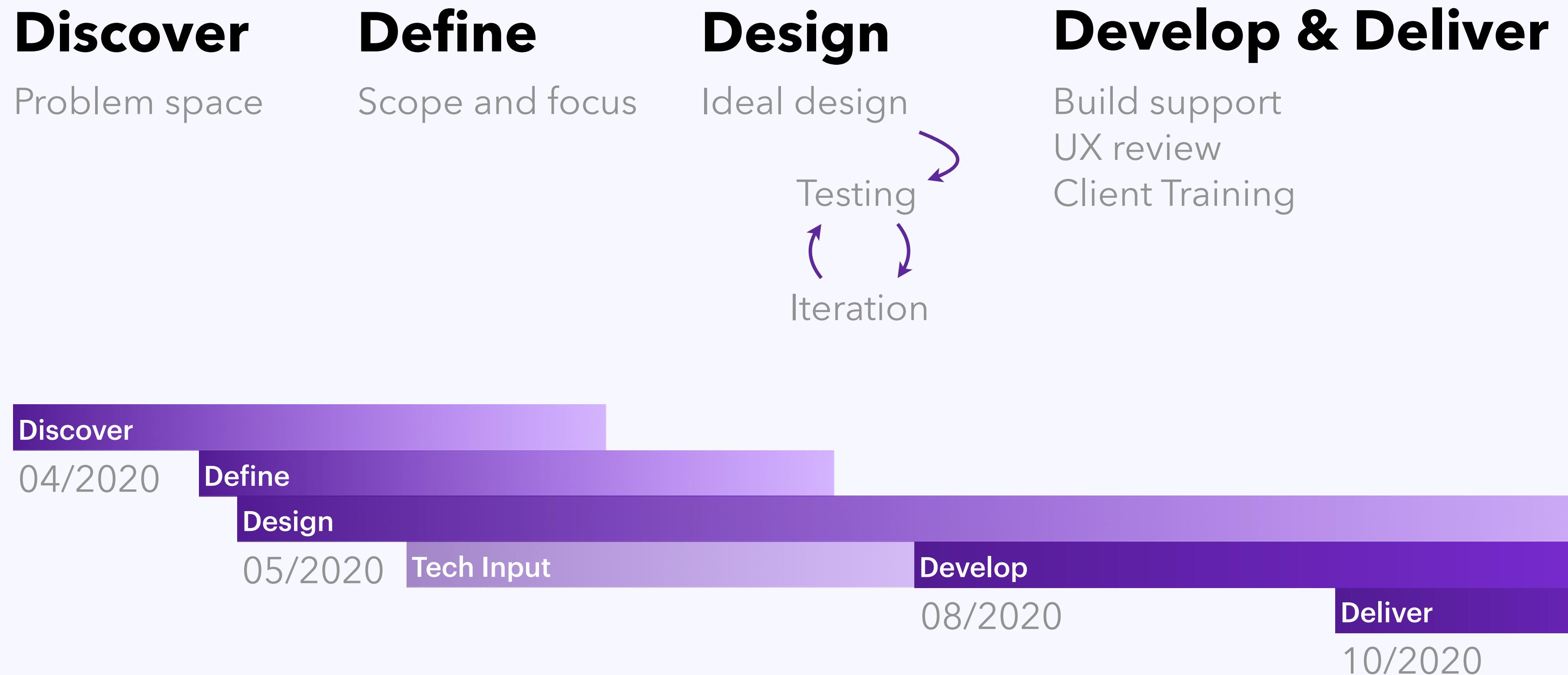


Lifion Developers

**Beacon**

our design system

# Process Timeline



## **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**

# 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\*

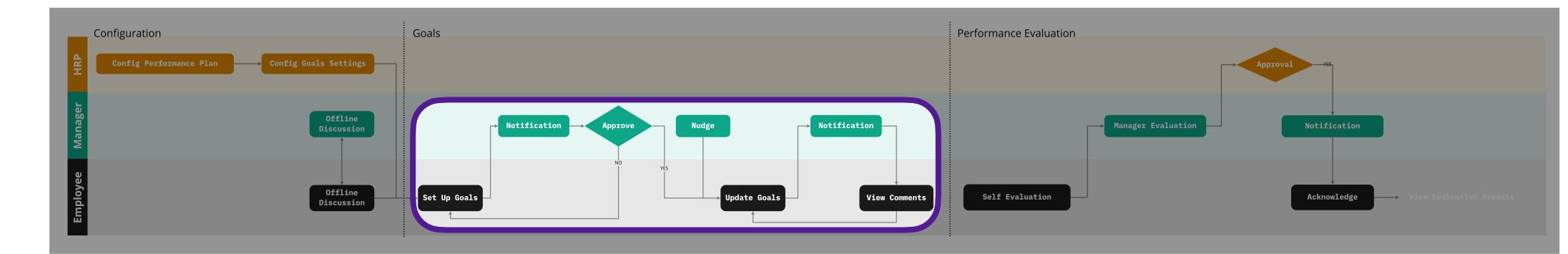
Careerbuilder Lynda

"show my manager this what I've achieved"

"have a direction where I am heading to"

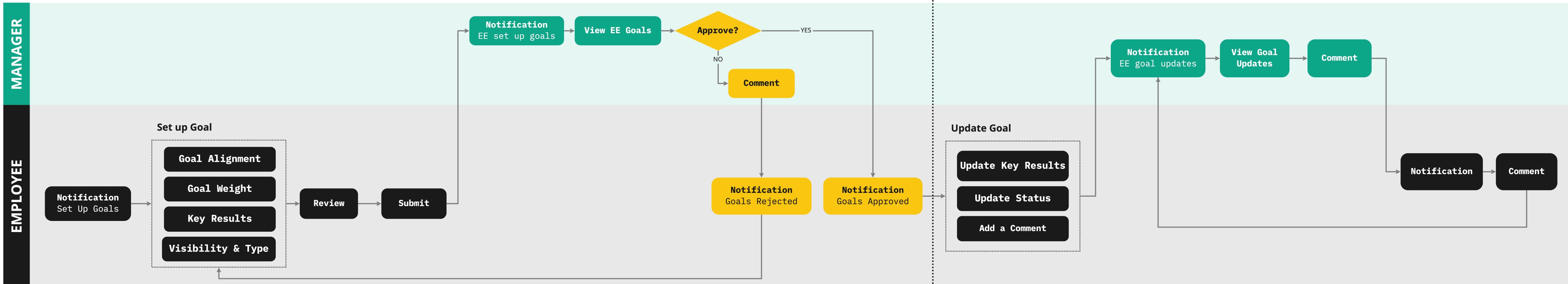
# Define Scope (V1)

What we must have in order to make it work?



Out of V1 Manager V1 Employee V1

## Set Up Goals



## **Define Objectives (V1)**

To build the foundation of Lifion Goals Management app, where employees can **easily and confidently 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

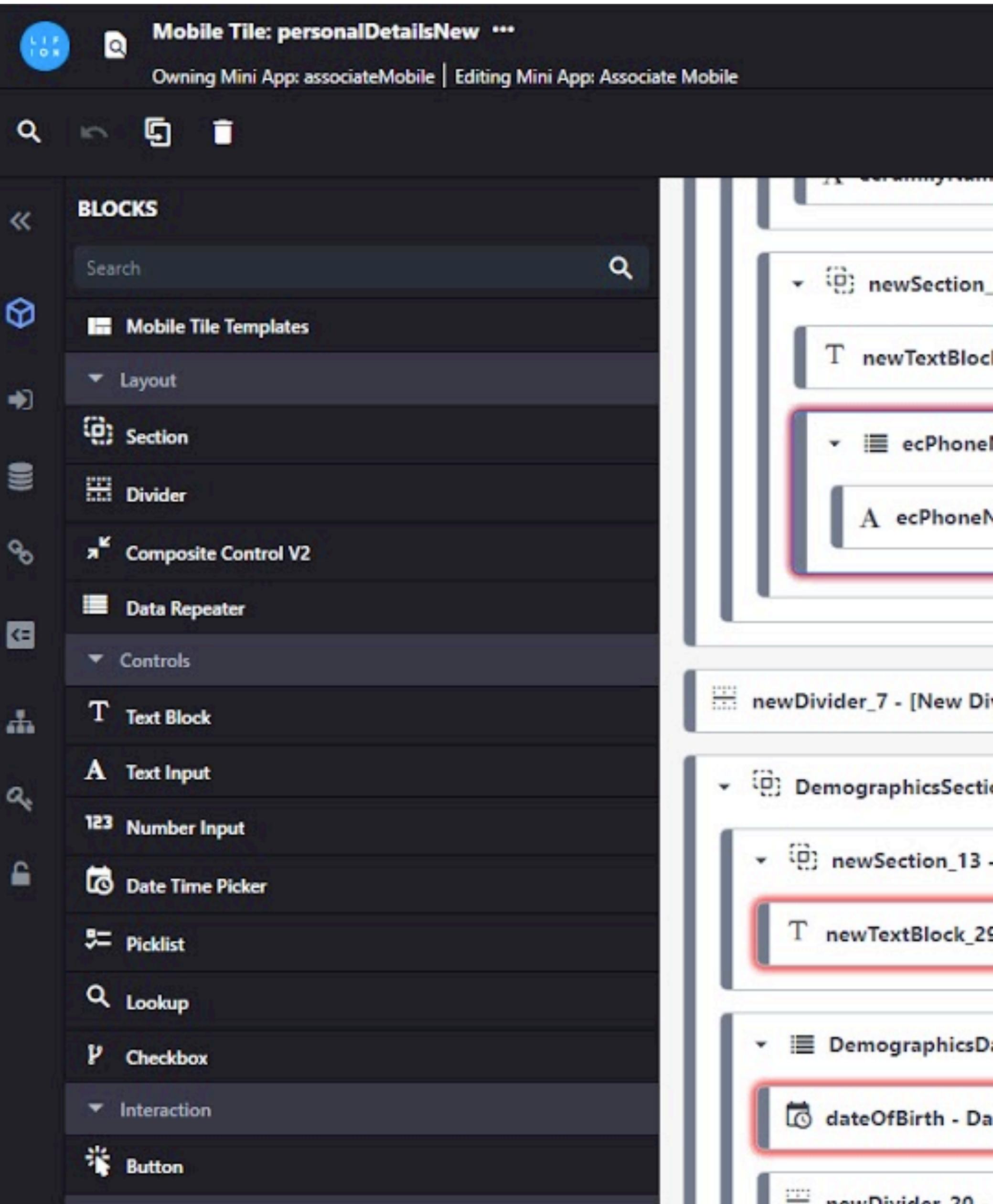
### **User confidence (4+)**

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

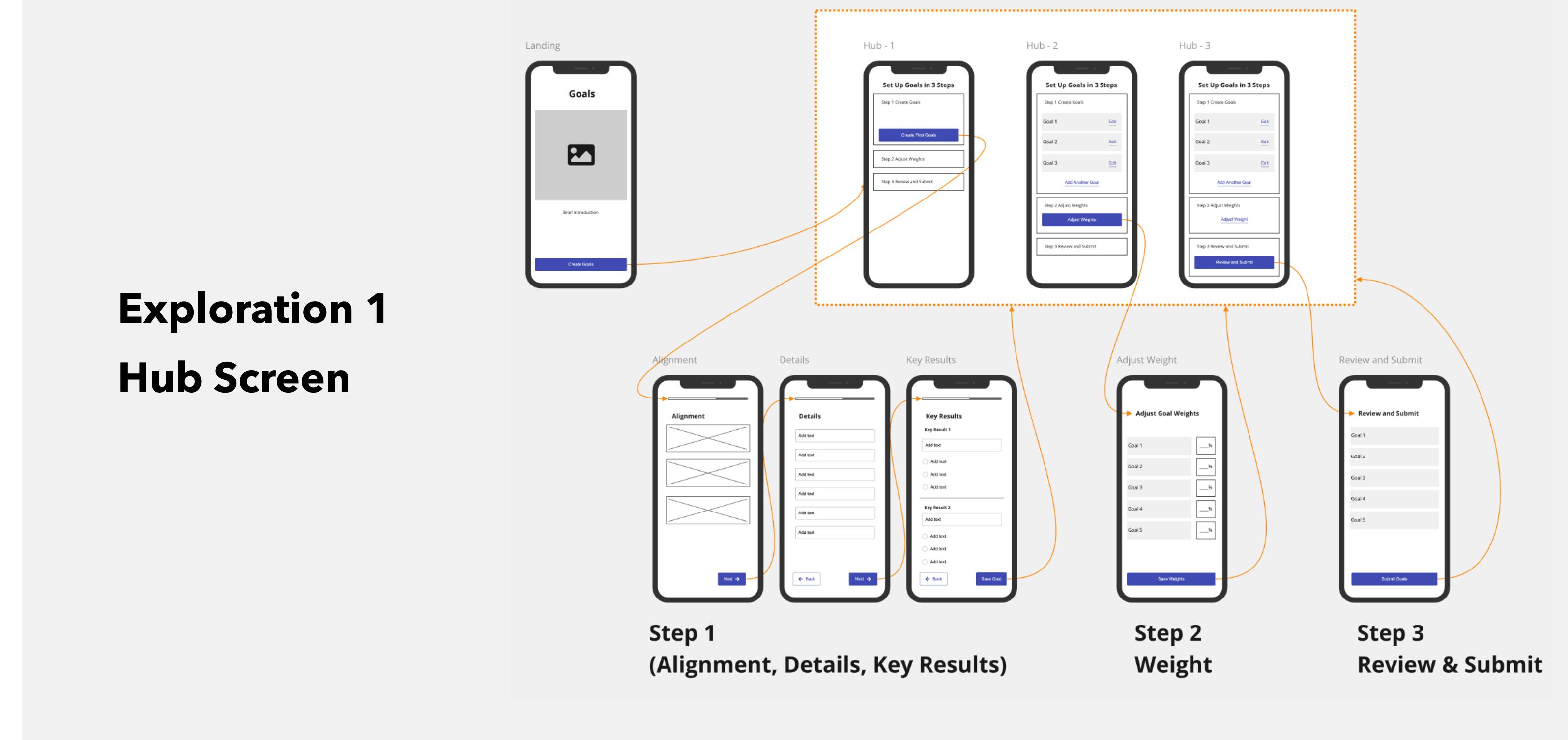
Pixel perfect

# Design Challenge

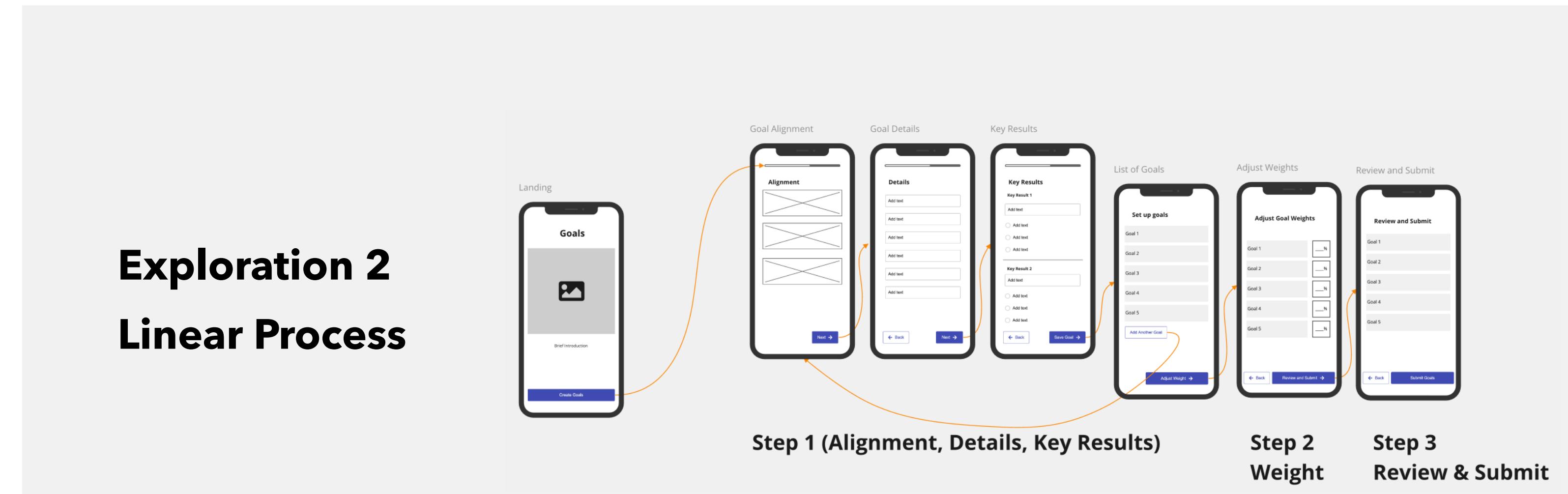
#1

Navigation

## Exploration 1 Hub Screen



## Exploration 2 Linear Process



The image consists of five vertically stacked screenshots from a mobile application for setting goals, illustrating a step-by-step 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 Your Goal" 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 "Define Your Goal" 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

Your Peers Everyone who reports to your manager

Everyone Everyone in your organization

A yellow arrow points from the "What type of goal is this?" section to the "Add Key Results" 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 "Key Result 1" section to the "Save Goal" button.
- 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 yellow arrow points from the "Edit" link in the "Performance Goals" section back to the "Create Your First Goal" button in the first screenshot.

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 VWX  
9 YZ  
. 0 X  
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!

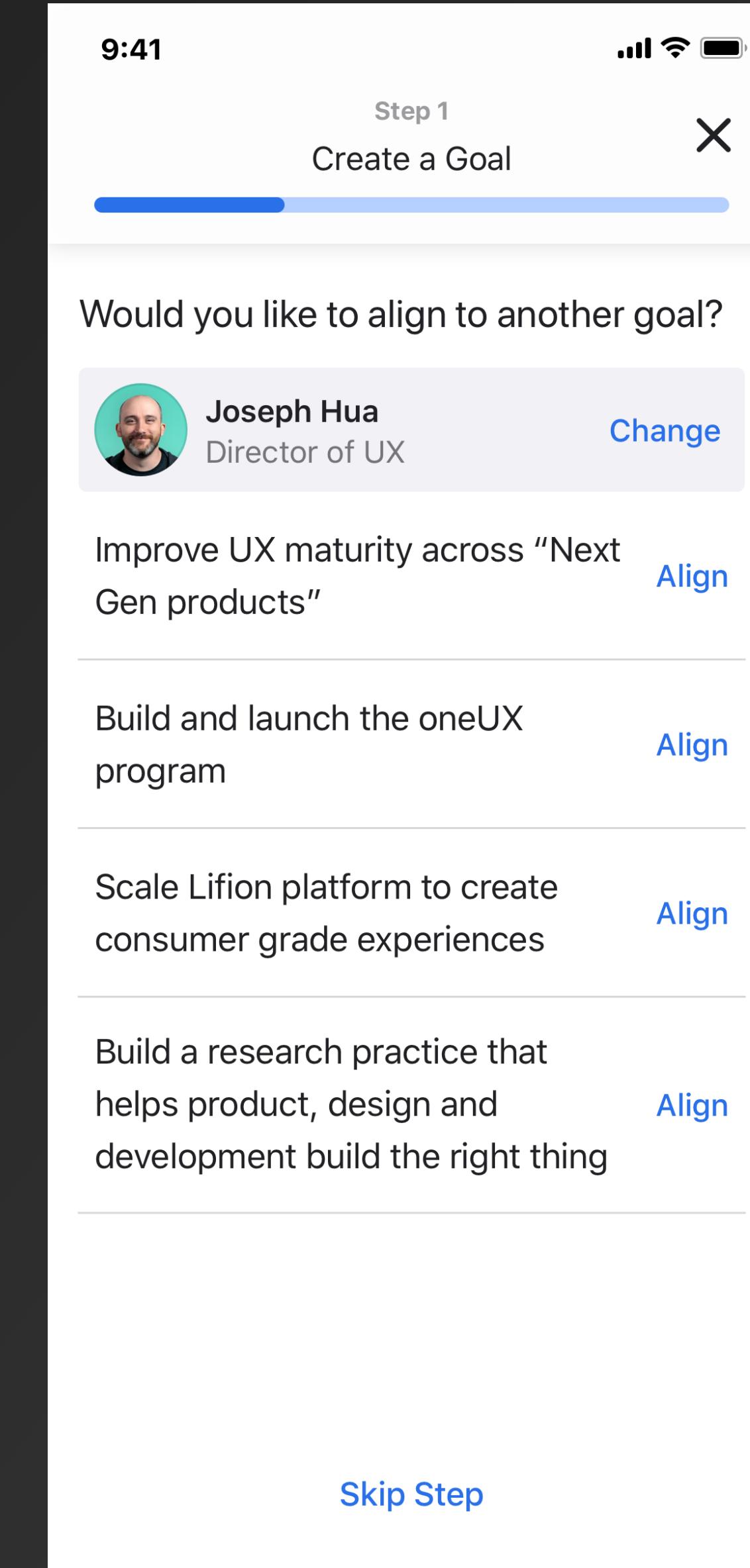
View Your Goals

# Design Challenge

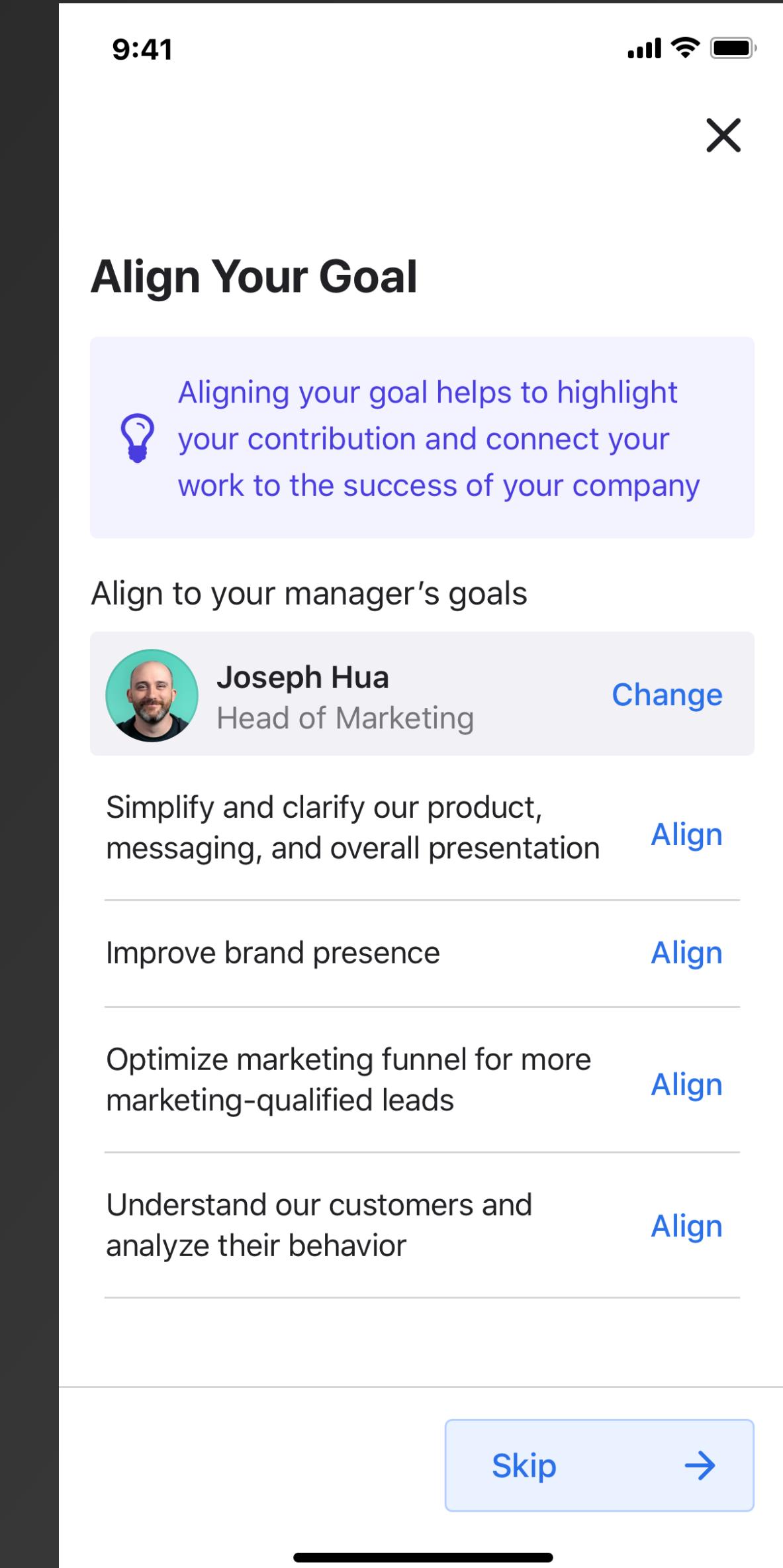
#2

## Educate users about new concepts

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



Initial Design

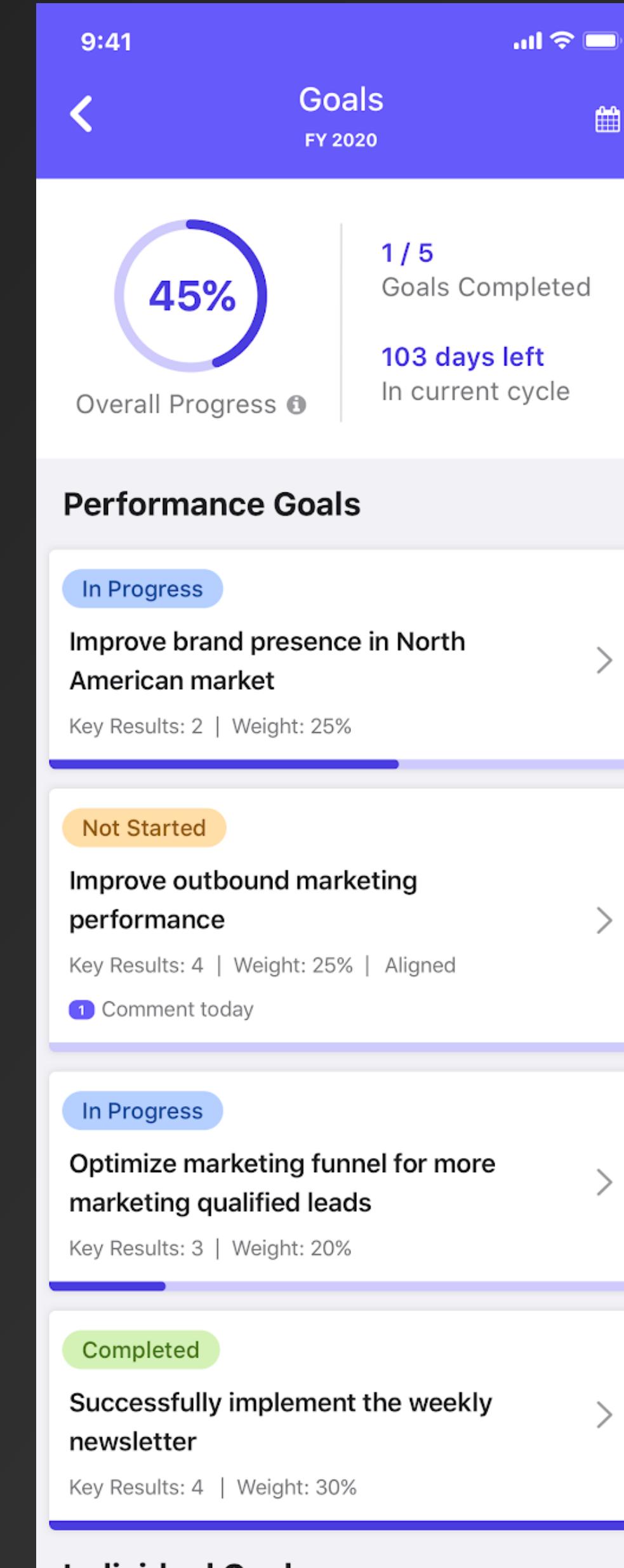


Final Design

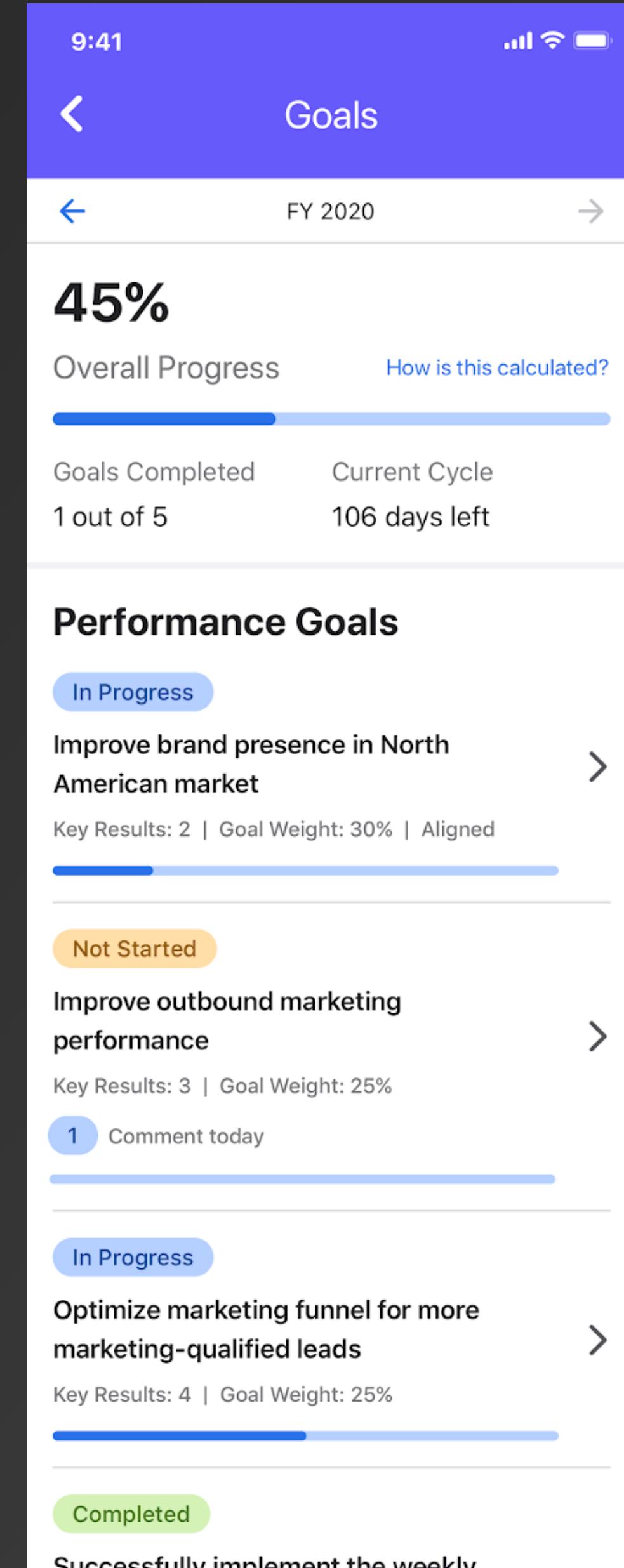
# Design Challenge

#3

Balance constraints and  
good user experience



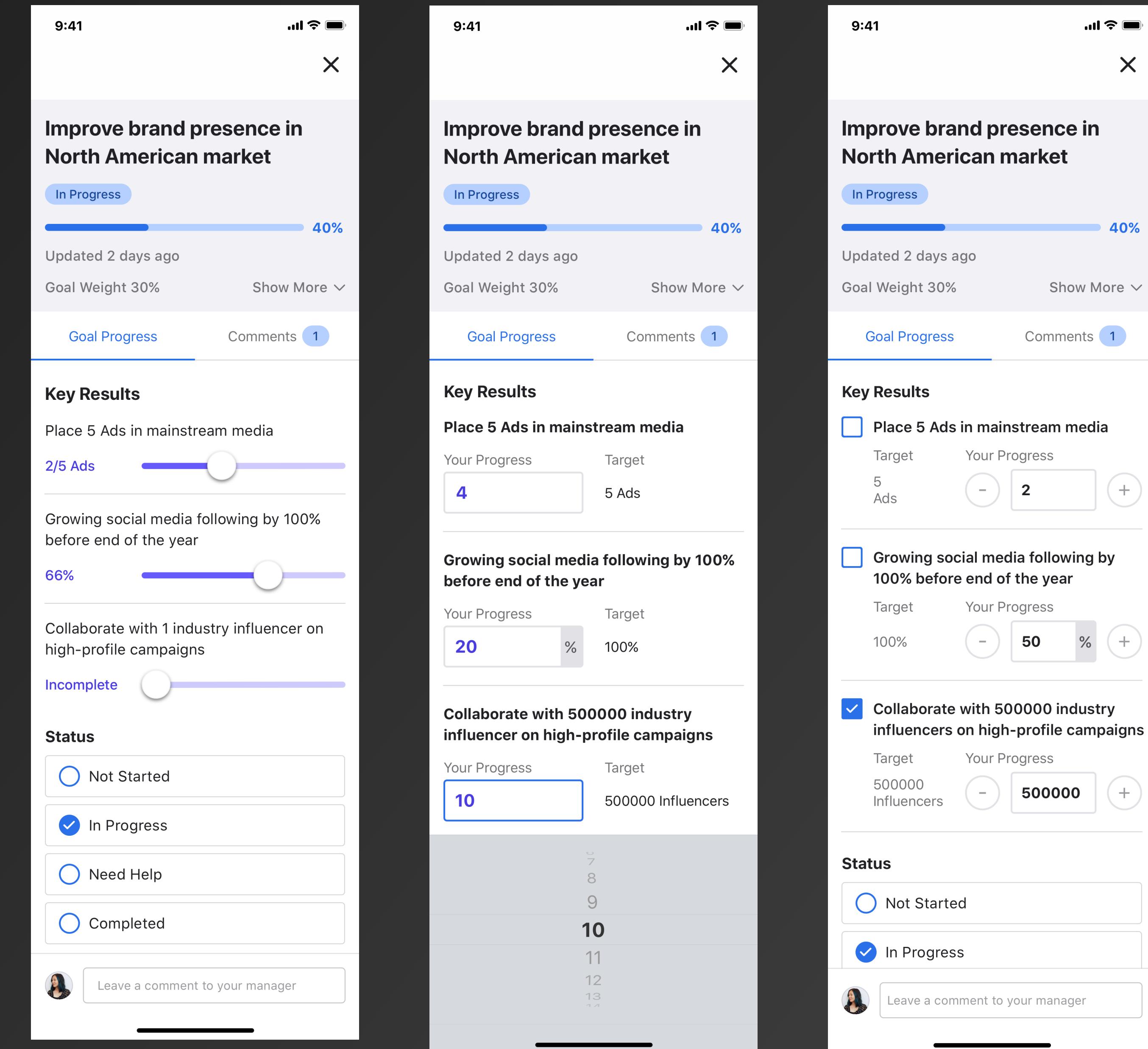
Initial Design



Final Design

# Design Challenge

#3  
Balance constraints and  
good user experience



Initial Design

Final Design

# Design Challenge

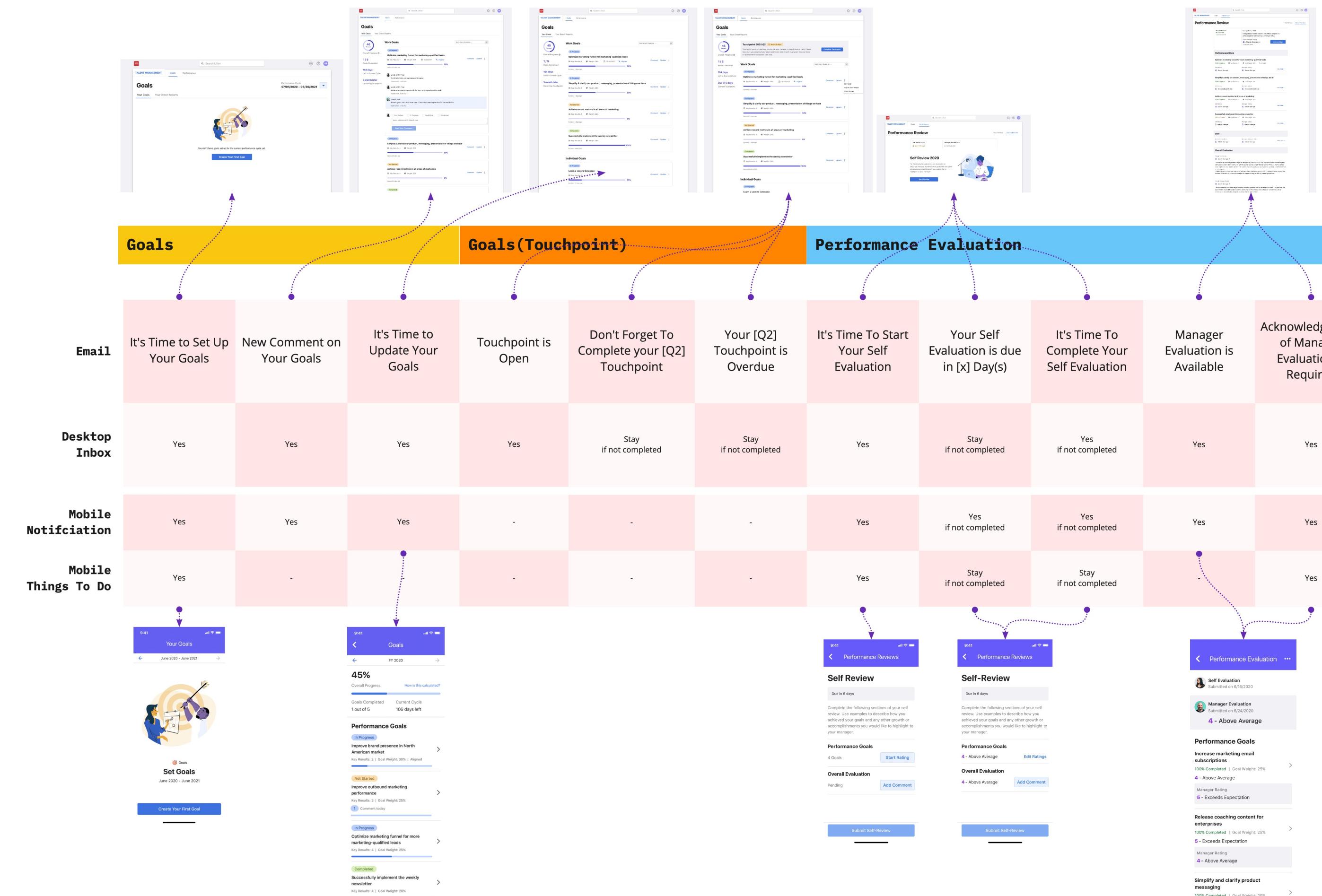
#4

## Design a Holistic Experience

What brings users to Goals Management app?

Goals Management app vs. the HR ecosystem

Motivated users vs. Unmotivated users



Notifications - Goals & Performance - Employee Experience

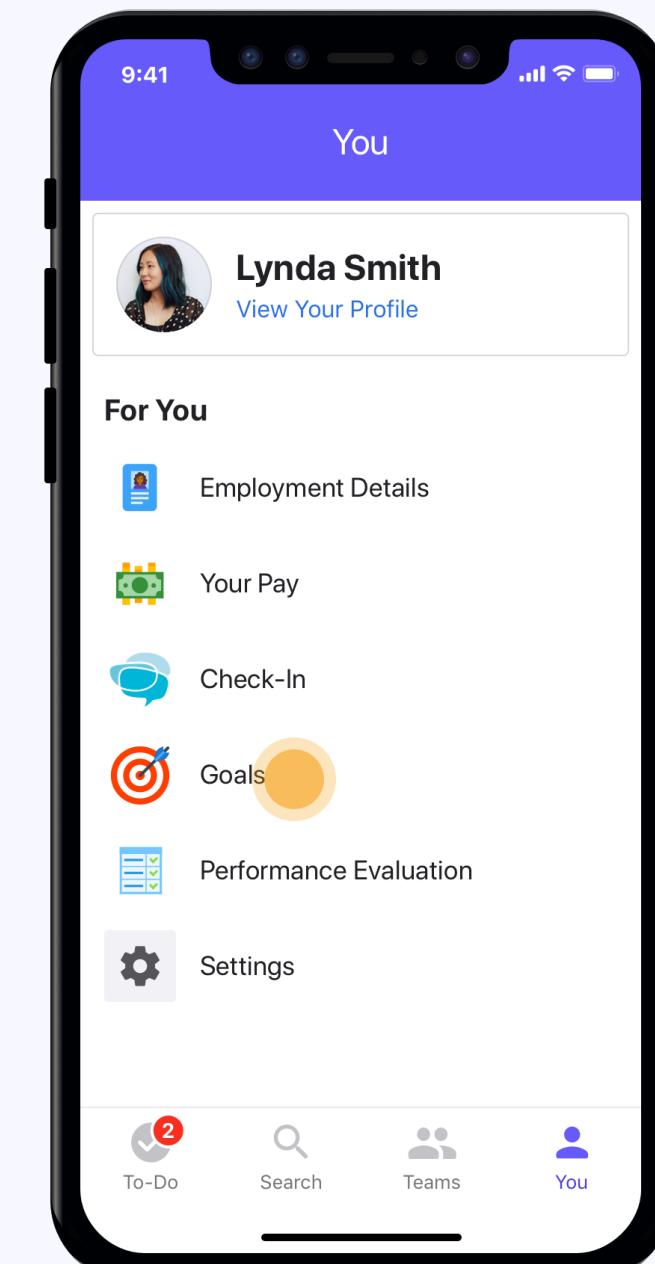
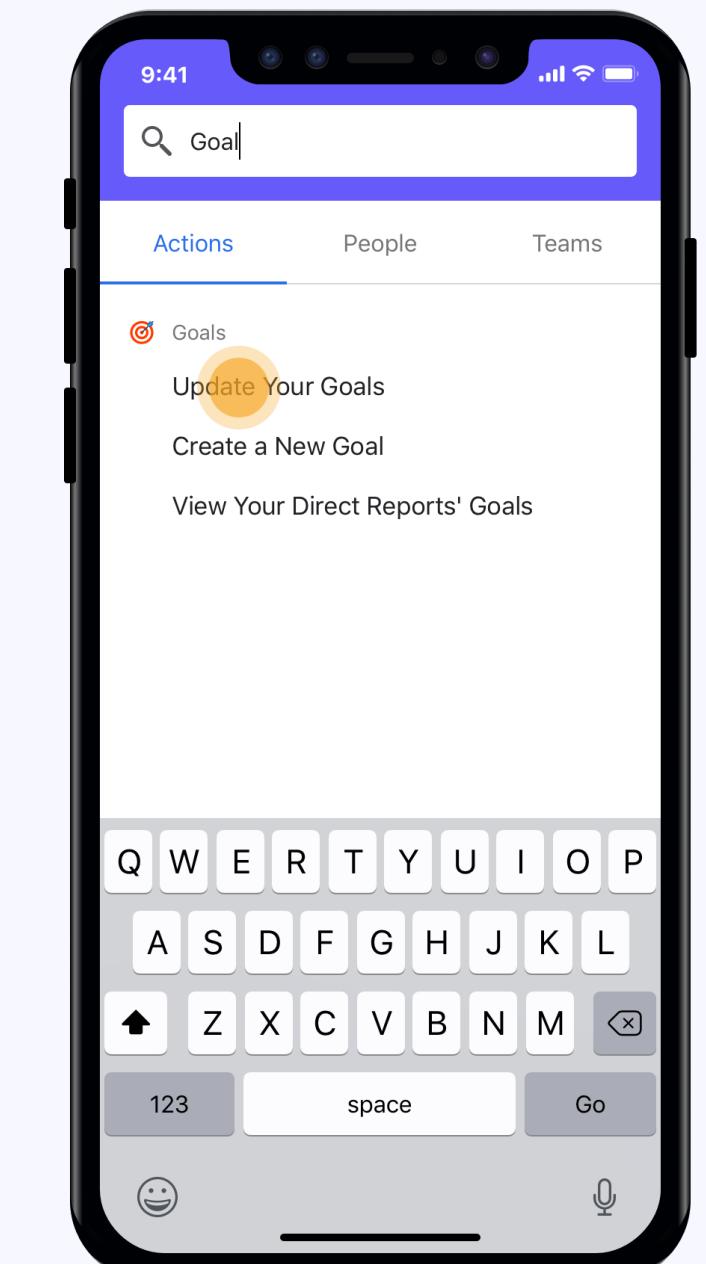
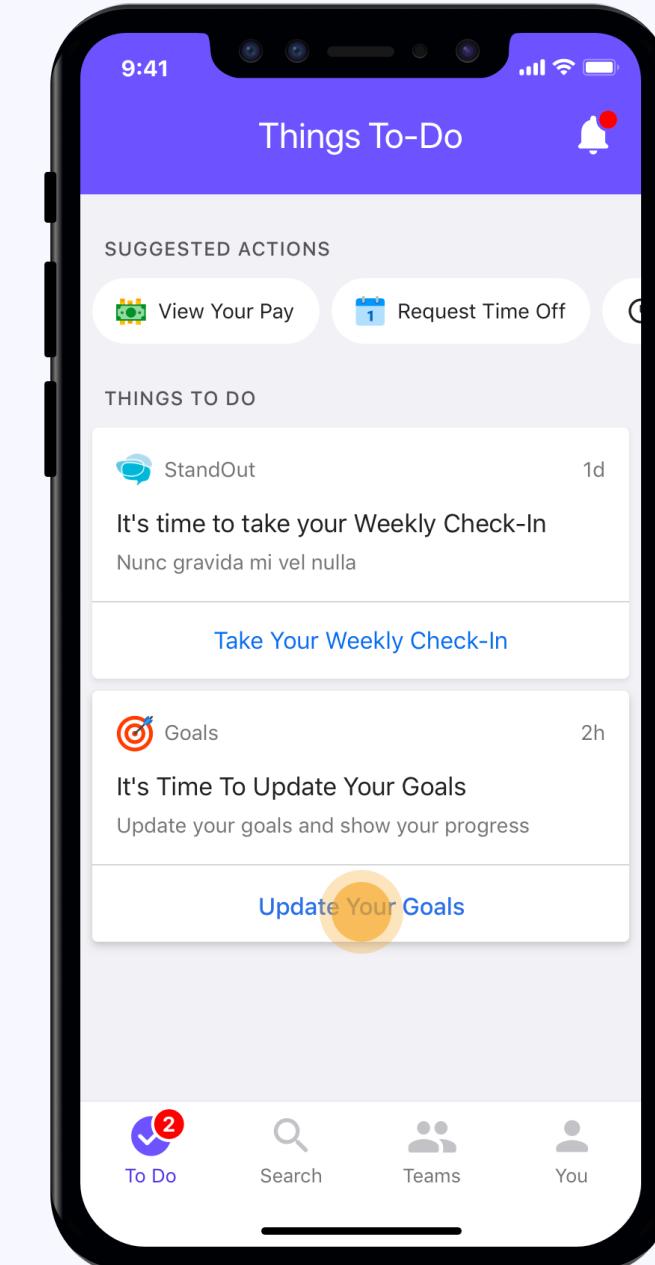
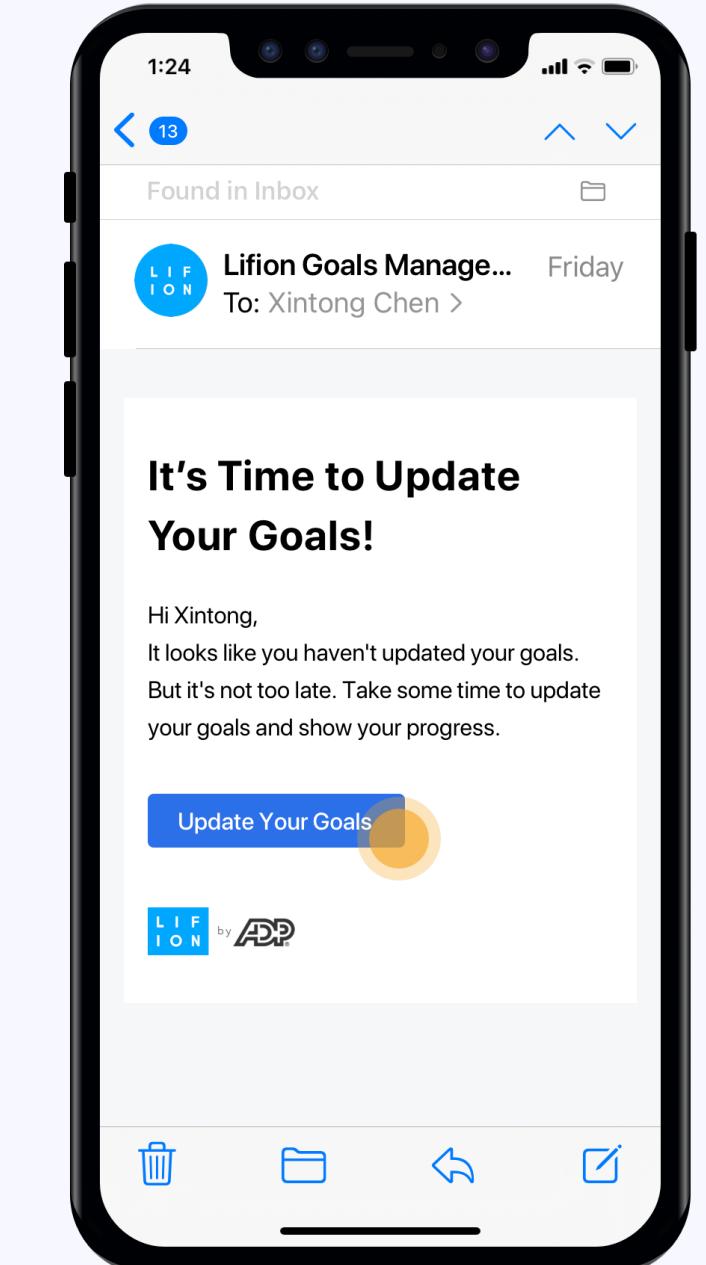
# Design Challenge

#4

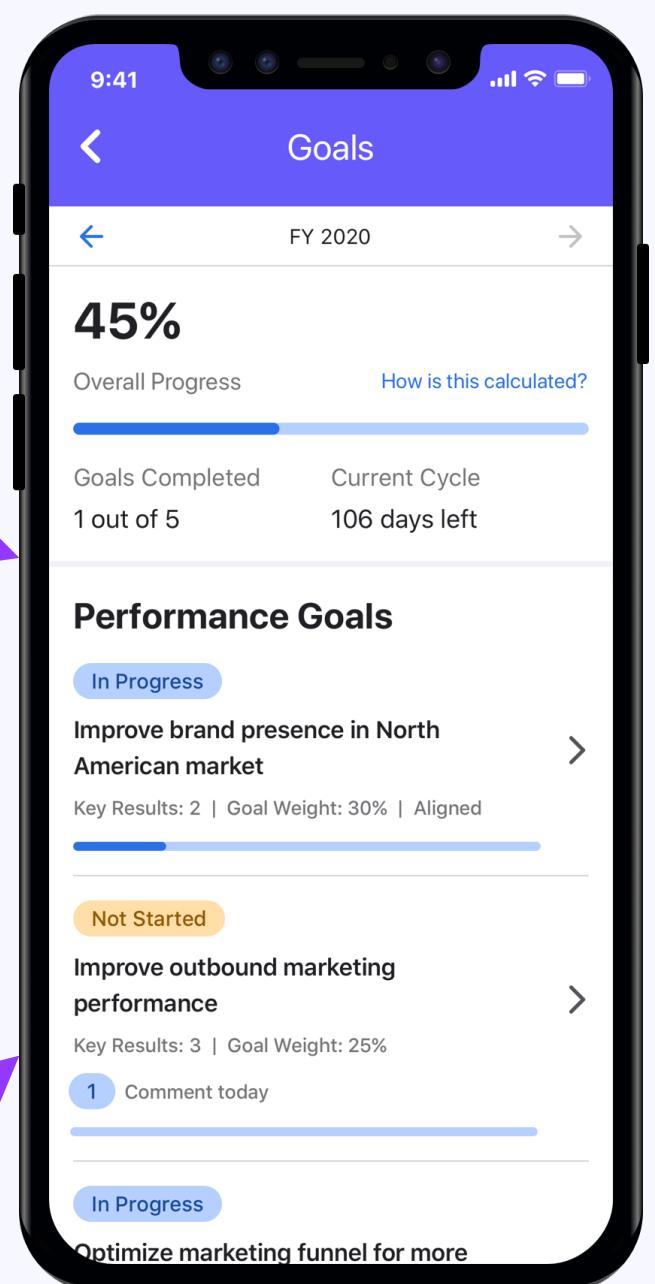
Design a Holistic Experience

Motivated  
Employees  
(search, profile)

Unmotivated  
Employees  
(notifications)



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!

## Define Design Success Metrics

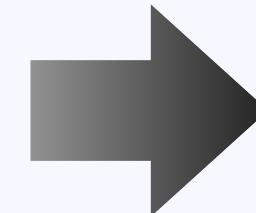
### Ease of use (4+)

I thought this system was easy to use

1 - Strongly disagree

5 - Strongly agree

4.21



4.38

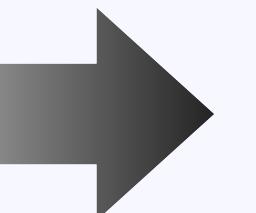
### User confidence (4+)

I felt very confident using this system

1 - Strongly disagree

5 - Strongly agree

4.03



4.25

# Develop Deliver

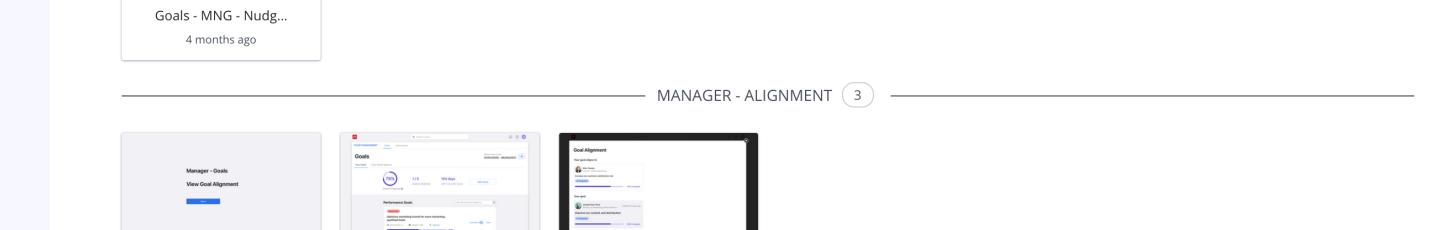
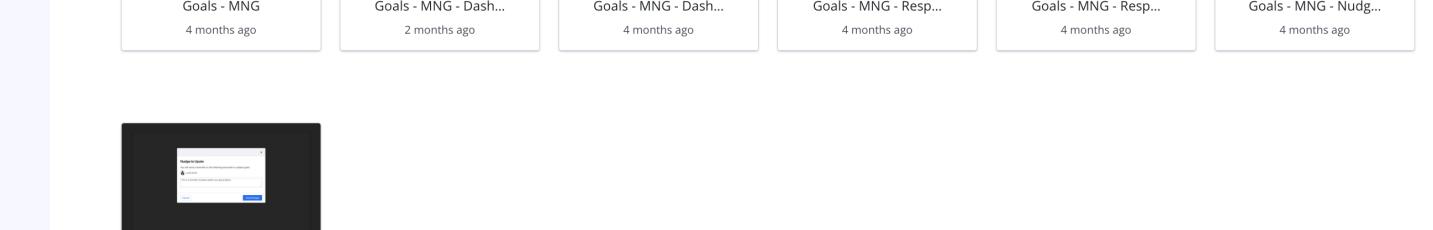
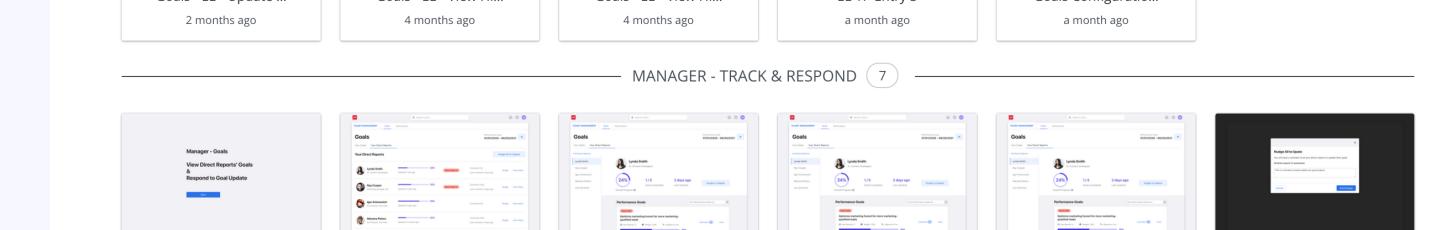
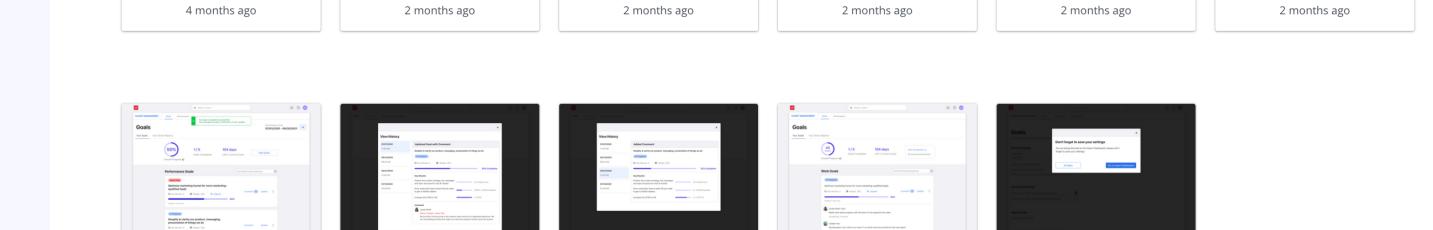
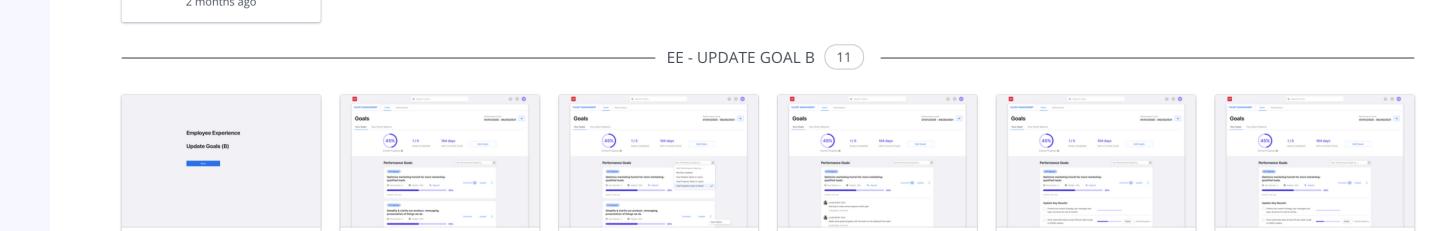
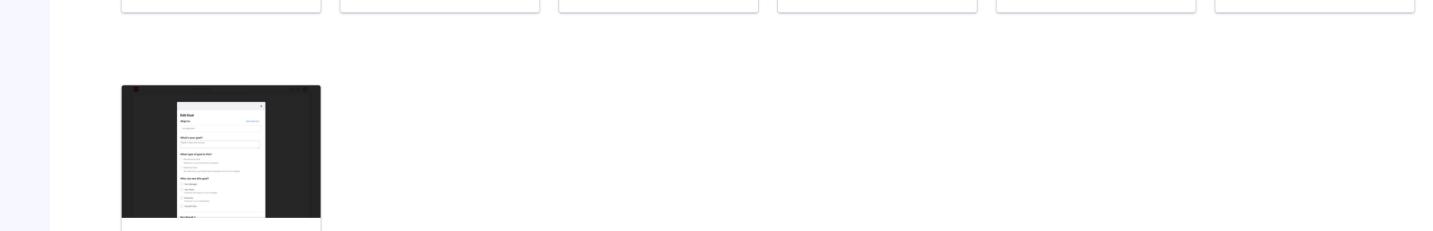
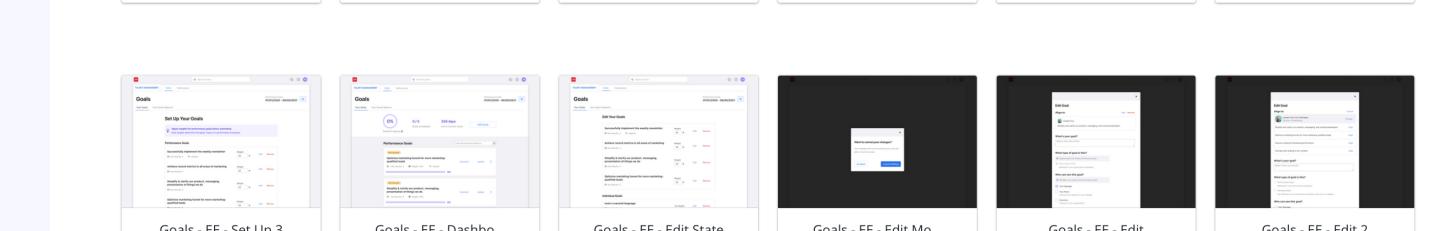
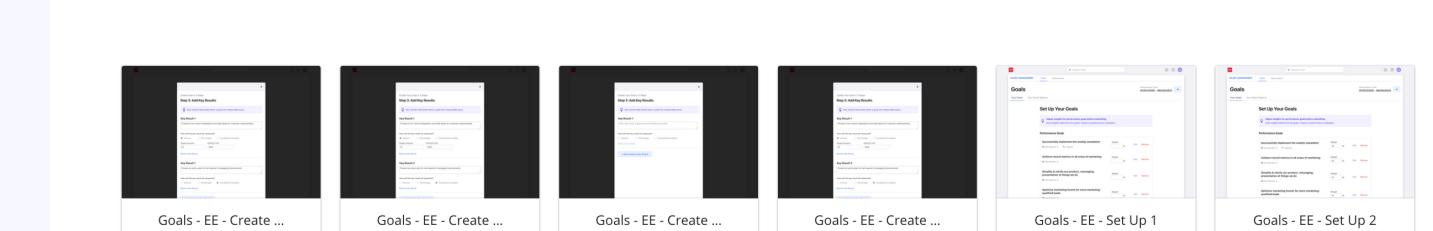
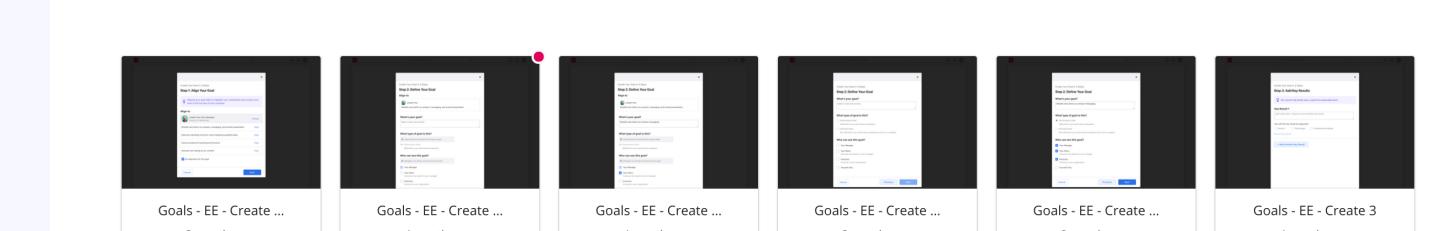
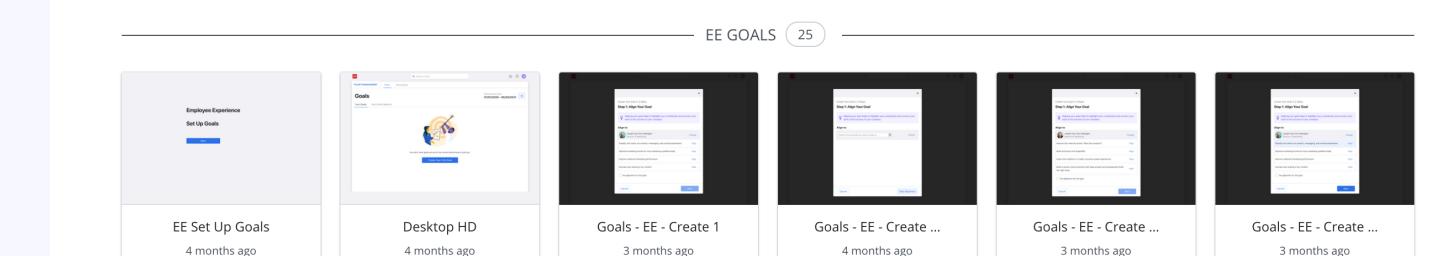
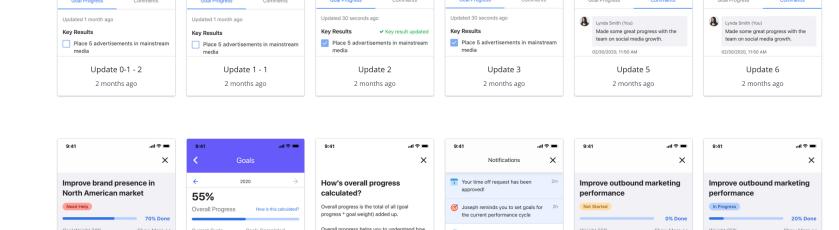
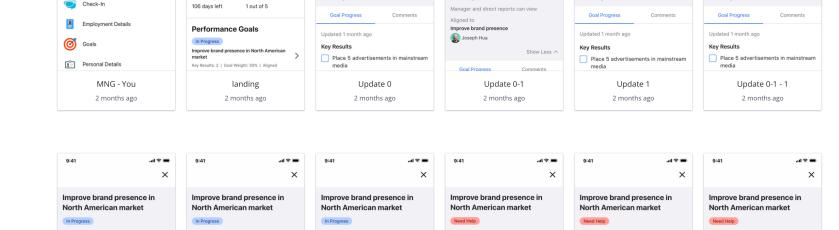
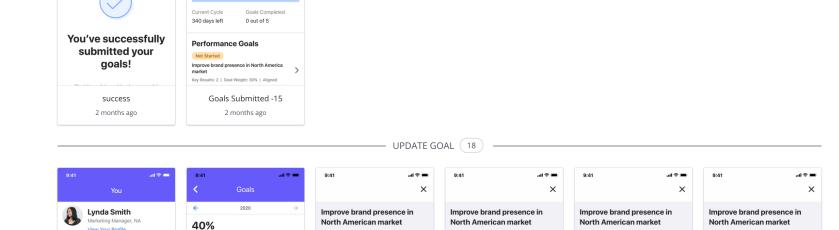
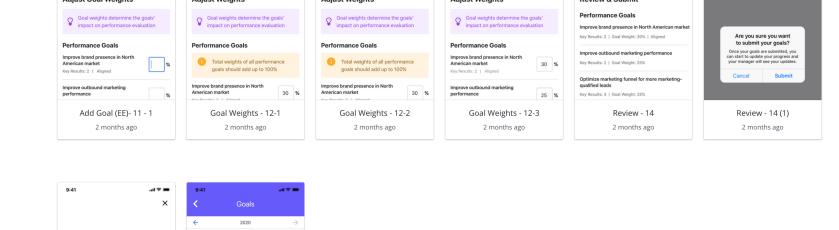
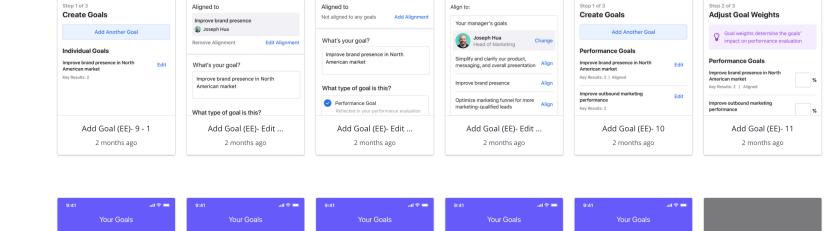
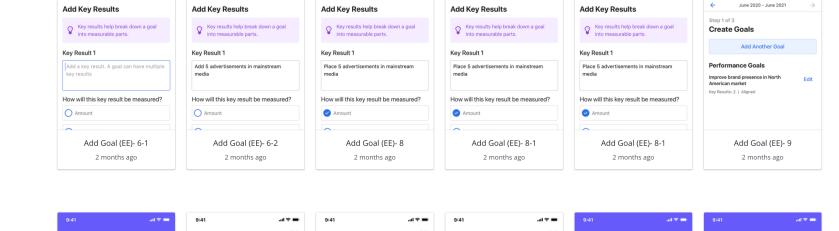
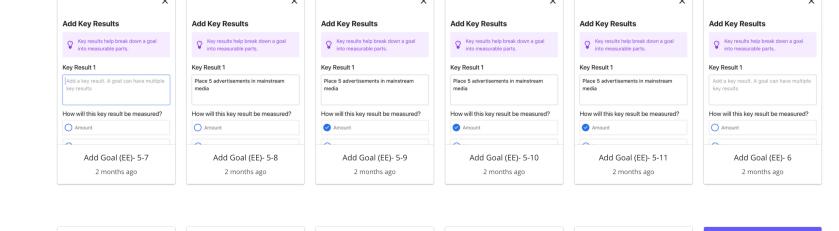
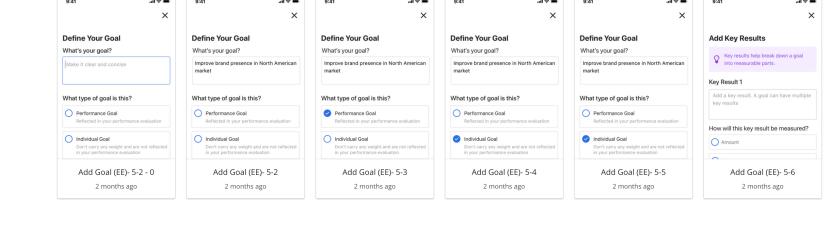
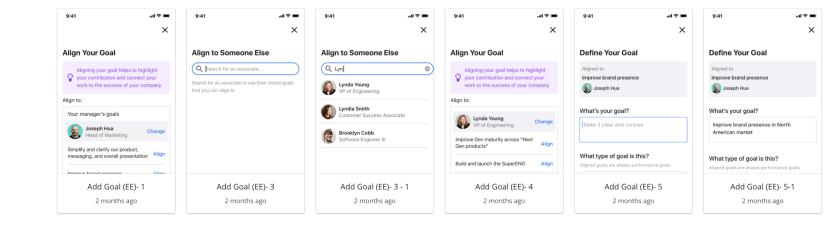
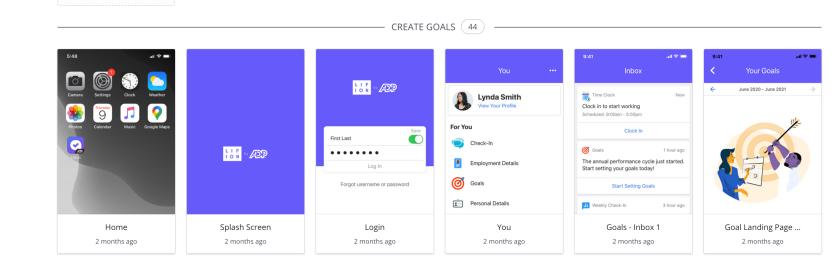
DELIVER

Desktop V1  
1 client - 10/2020

Mobile V1  
2 clients - 3/2021

NEXT STEPS

Kick off 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>