

Goals Management

Empowers employees to set up and track goals on their mobile phone, which promotes growth and drives performance for both individuals and organizations.

The screenshot displays a goal management system interface. At the top, a navigation bar includes 'TALENT MANAGEMENT', 'Goals' (selected), and 'Performance Evaluation'. A search bar with 'apple.com' is present. The main content area is titled 'Goals' and shows 'Your Goals' and 'Your Direct Reports'. On the left, a summary is provided: Overall Progress (45 Percent), Goals Completed (1 / 5), Left in Current Cycle (104 days), and Upcoming Touchpoint (3 months later). A blue button 'Add New Goal' is visible. The right side lists four performance goals with progress bars: 'Optimize marketing funnel for marketing-qualified leads' (In Progress, 50%), 'Simplify & clarify our product, messaging, presentation of things we have' (Need Help, 50%), 'Achieve record metrics in all areas of marketing' (Not Started, 0%), and 'Successfully implement the weekly newsletter' (Completed). Each goal has a 'Comment', 'Update', and 'More' button. A smartphone on the right shows a mobile app interface with similar goal management features, including a progress bar at 45% and a list of goals with status indicators like 'In Progress' and 'Not Started'.

I'm designing at Lifion on the Talent squad

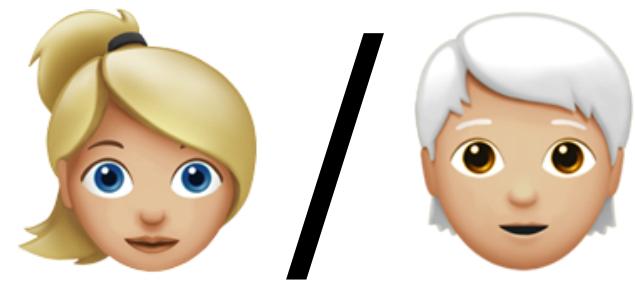


Building the next generation HCM platform that
helps organizations and people grow

My Team, My Role



Product Design + Research



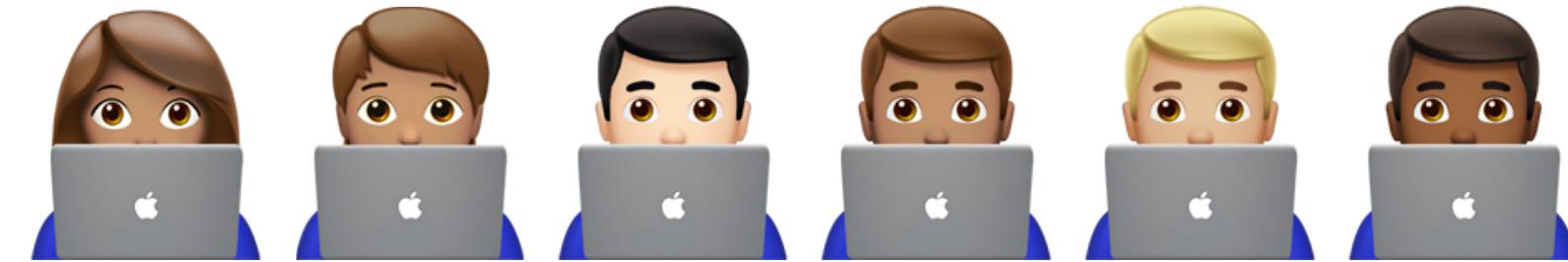
Product Owner



UX Writer



Design System Designers



Lifion Developers



Beacon

our design system

Process, Timeline

Discover

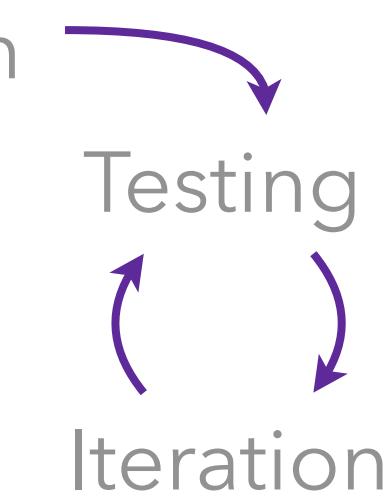
Problem space

Define

Scope and focus

Design

Ideal design



Develop + Deliver

Build support
UX review
Client Training

Discover

04/2020

Define

Design

05/2020

Tech Input

Develop

08/2020

Deliver

10/2020

Business Needs

Organizations want 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**

Personas & 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.



Employees*

Careerbuilder Lynda

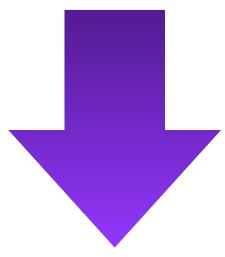
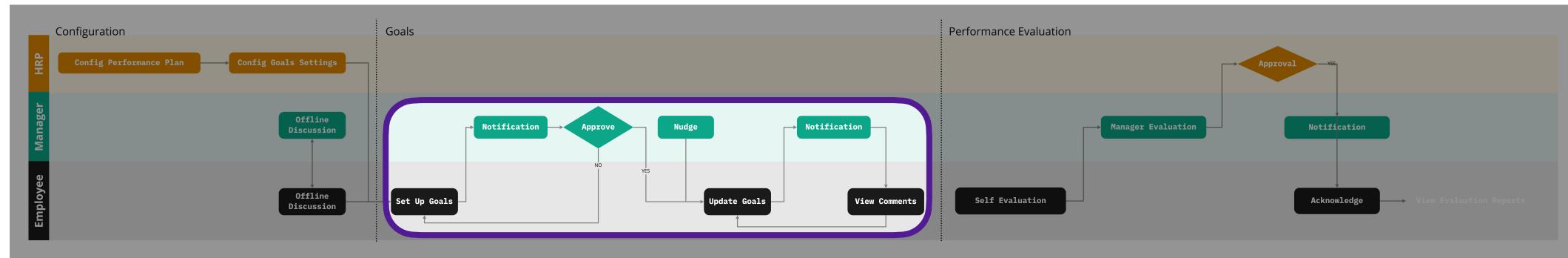
"show my manager this what I've achieved"

"have a direction where I am heading to"

* referring customer employees and managers

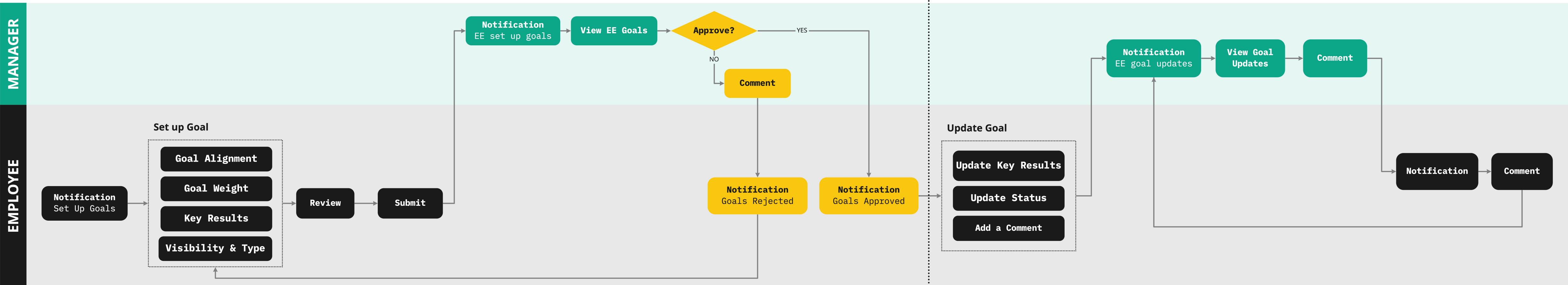
Define Scope (V1)

What we must have in order to make it work?



Yellow square: Out of V1 Teal square: Manager V1 Black square: 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

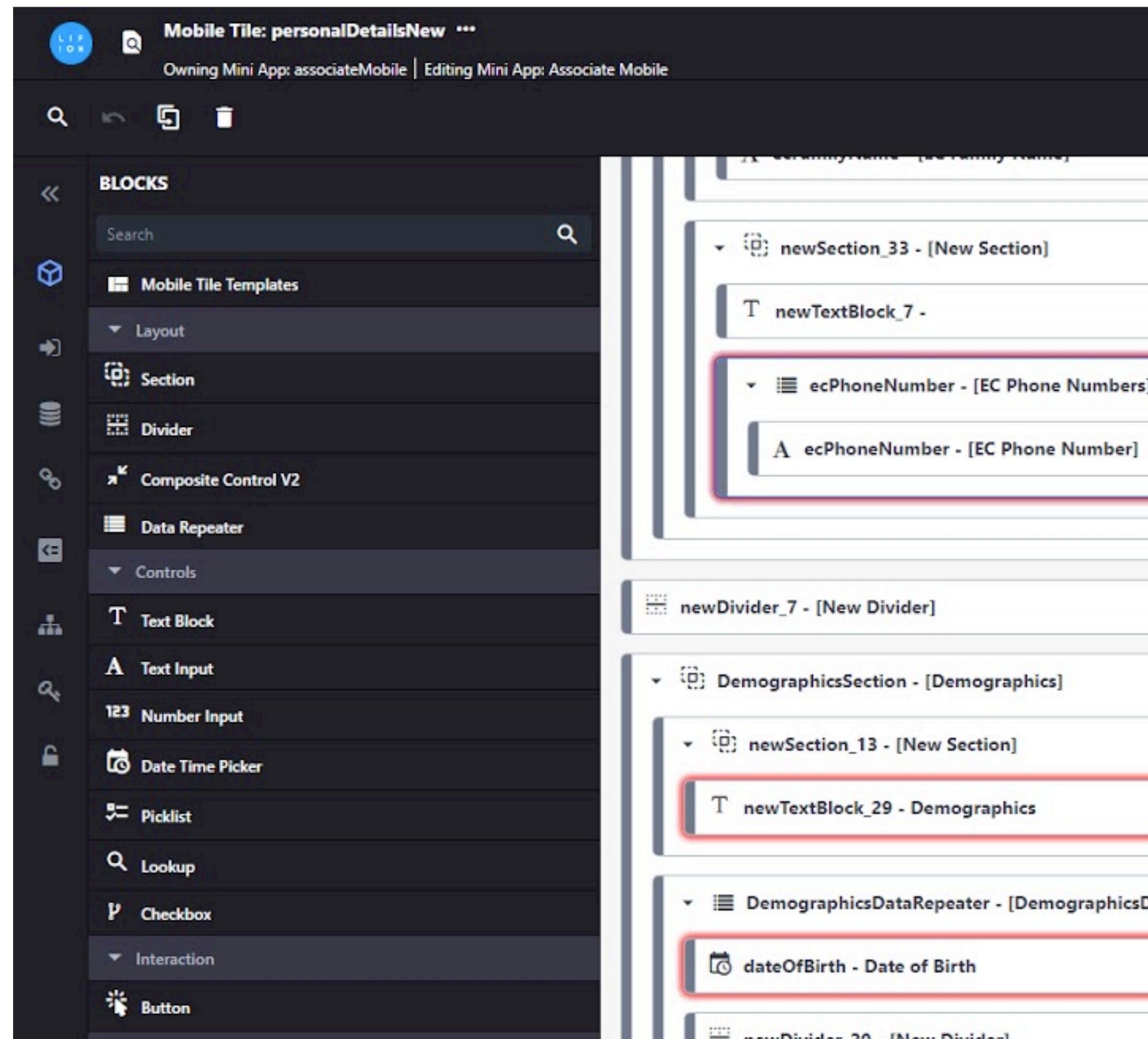
Technical Constraints

We have very limited mobile components available in the platform

How long does it take to refine a component?

How far ahead should we have concept design ready?

How does product designer work with Beacon designer?



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

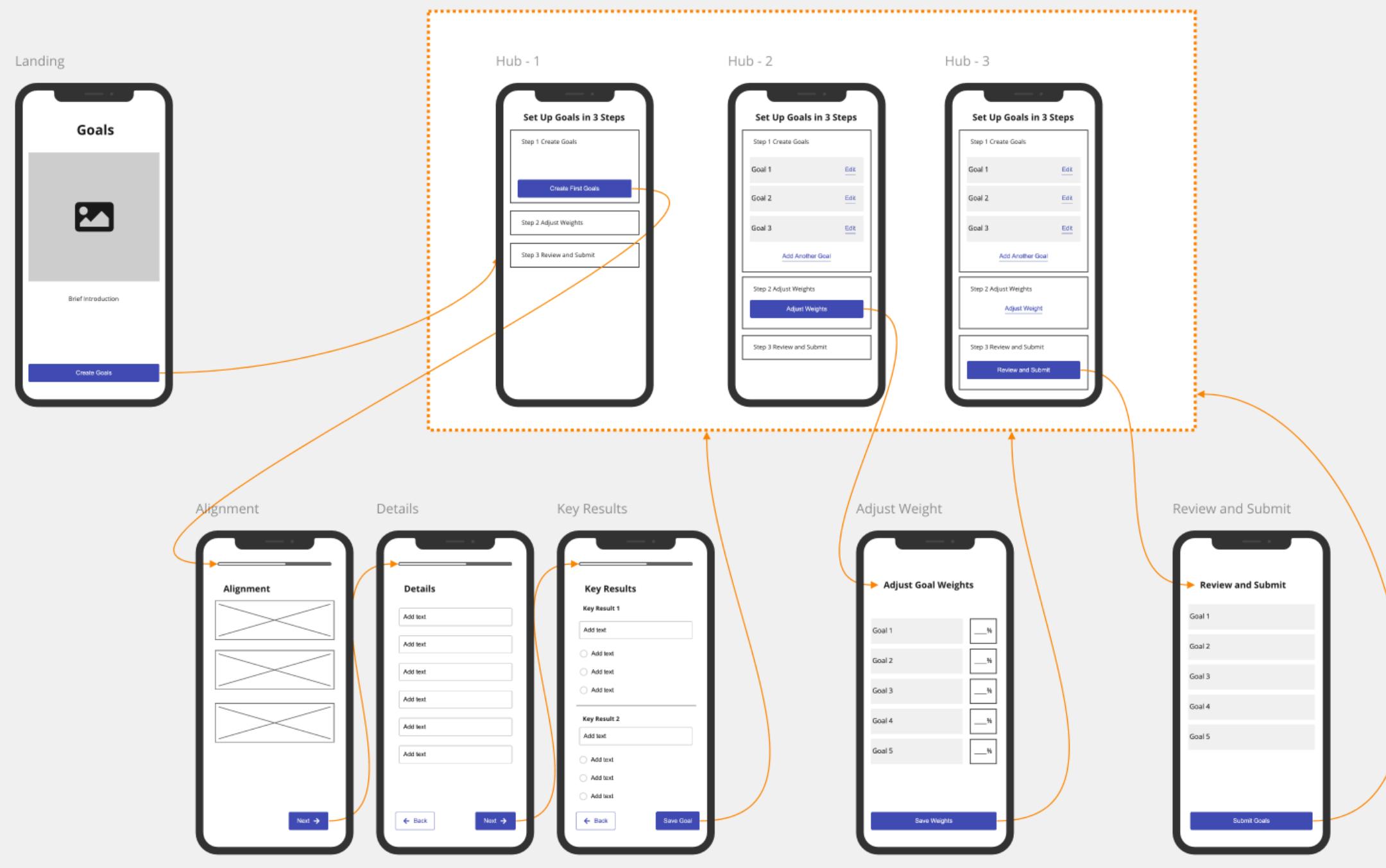
1 WEEKS

Detail Design

Pixel perfect

Design Challenge 1 - Navigation

Exploration 1 - Hub Screen

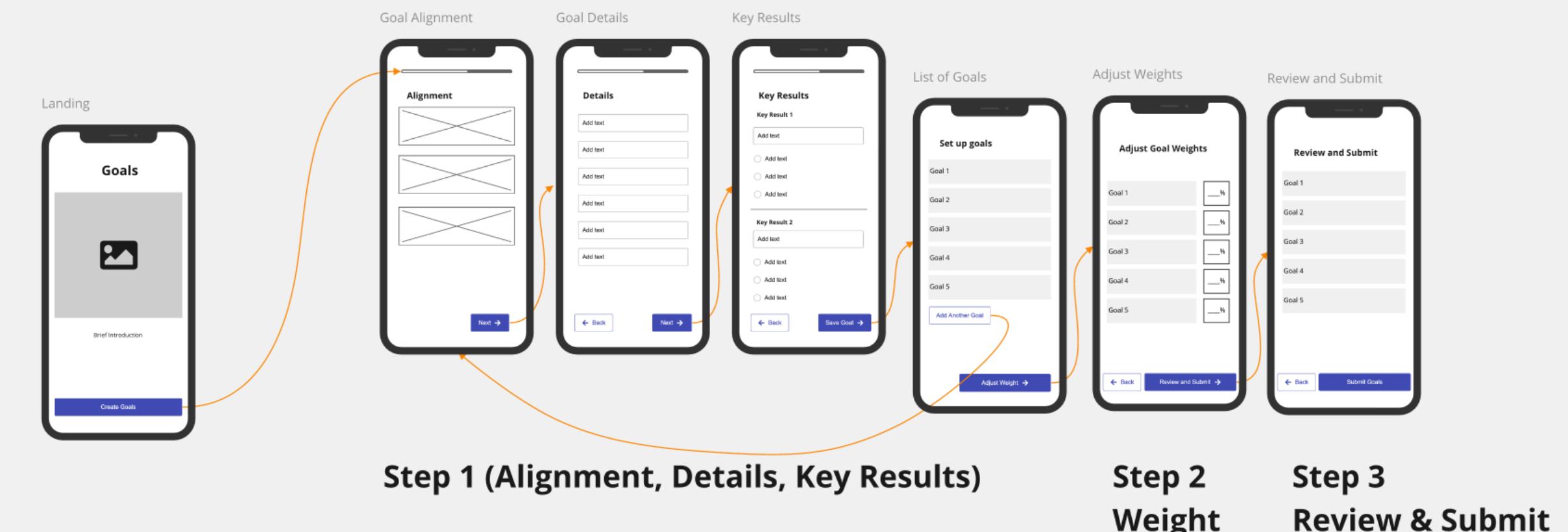


Step 1
(Alignment, Details, Key Results)

Step 2
Weight

Step 3
Review & Submit

Exploration 2 - Linear Process



Step 1 (Alignment, Details, Key Results)

Step 2
Weight

Step 3
Review & Submit

Step 1 of 3

Create Goals

June 2020 - June 2021

Performance Goals

Improve brand presence in North American market

Key Results: 2 | Aligned

Add Another Goal

Adjust Goal Weights

Goals are not submitted yet, please adjust weights before submission

Your Goals

June 2020 - June 2021

Set Goals

June 2020 - June 2021

Create Your First 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

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

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

Percentage

Complete / Incomplete

Target Amount: 5

Amount Unit: Advertisements

Remove Key Result

Key Result 2

Boost brand recognition by 50%

Skip →

← Previous Next →

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!

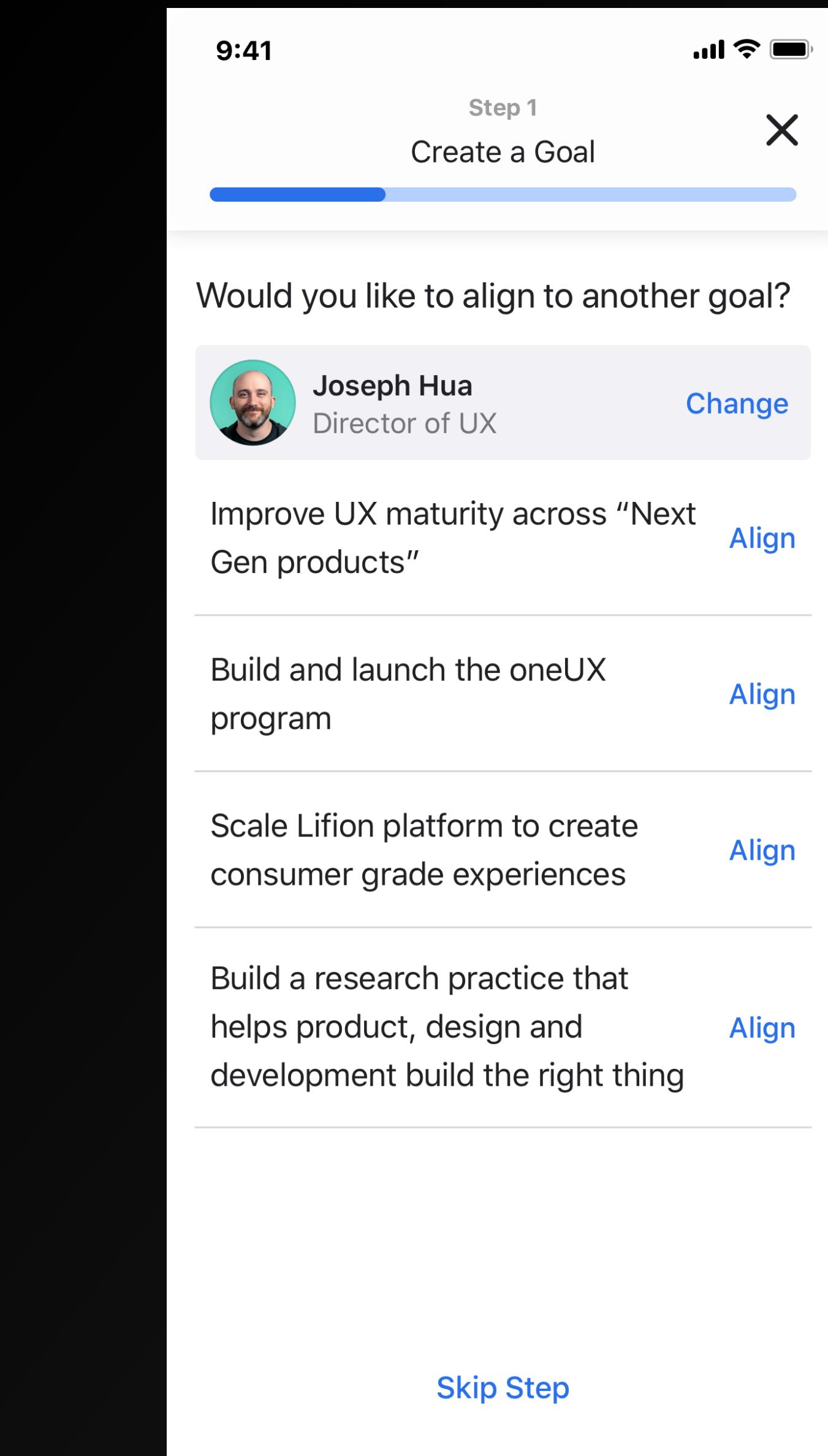
Start to update and track your goals!

View Your Goals

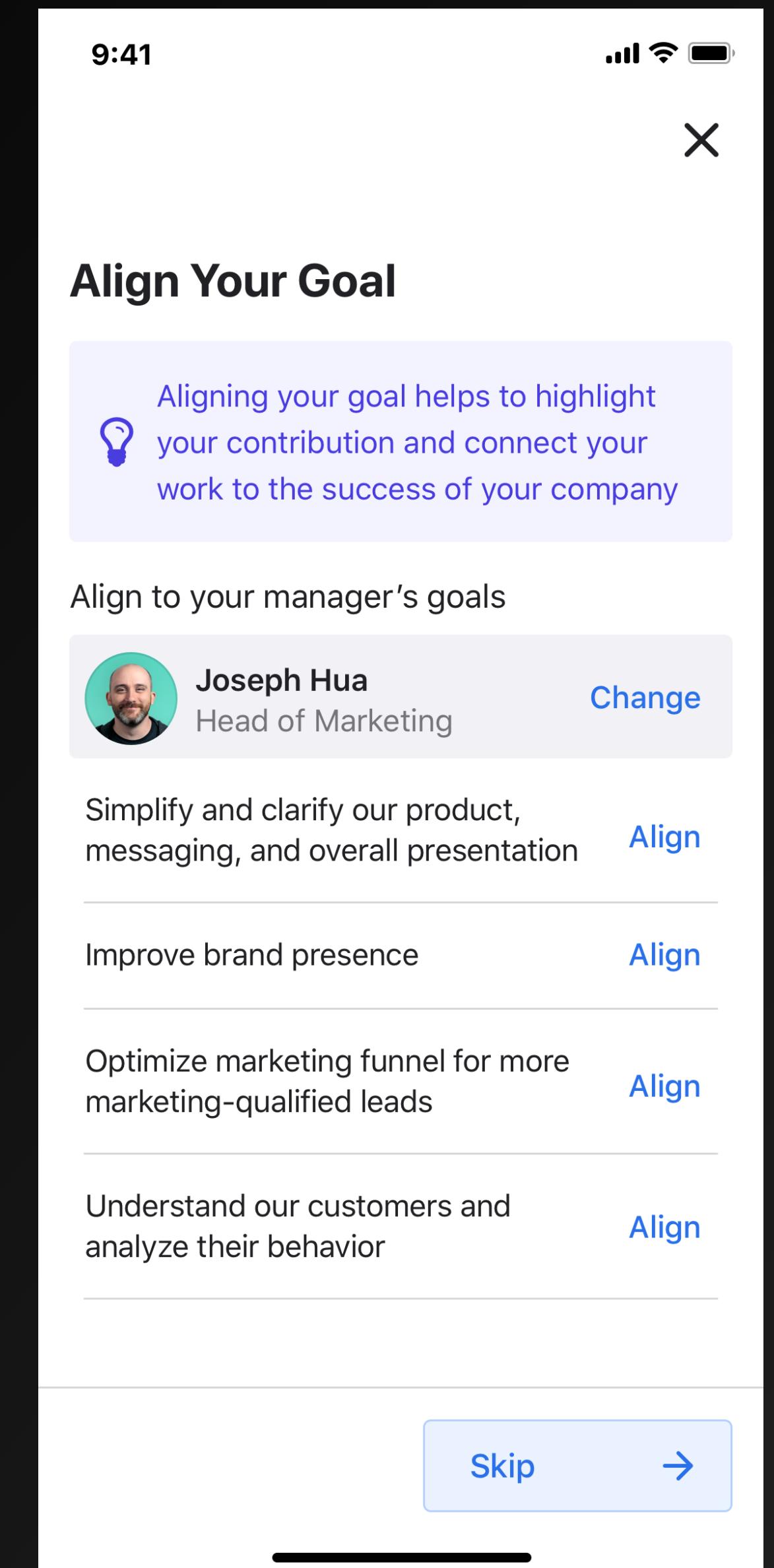
Design Challenge 2

Educate users about new concepts

Sprinkled purple tips throughout the entire process to introduce new concepts



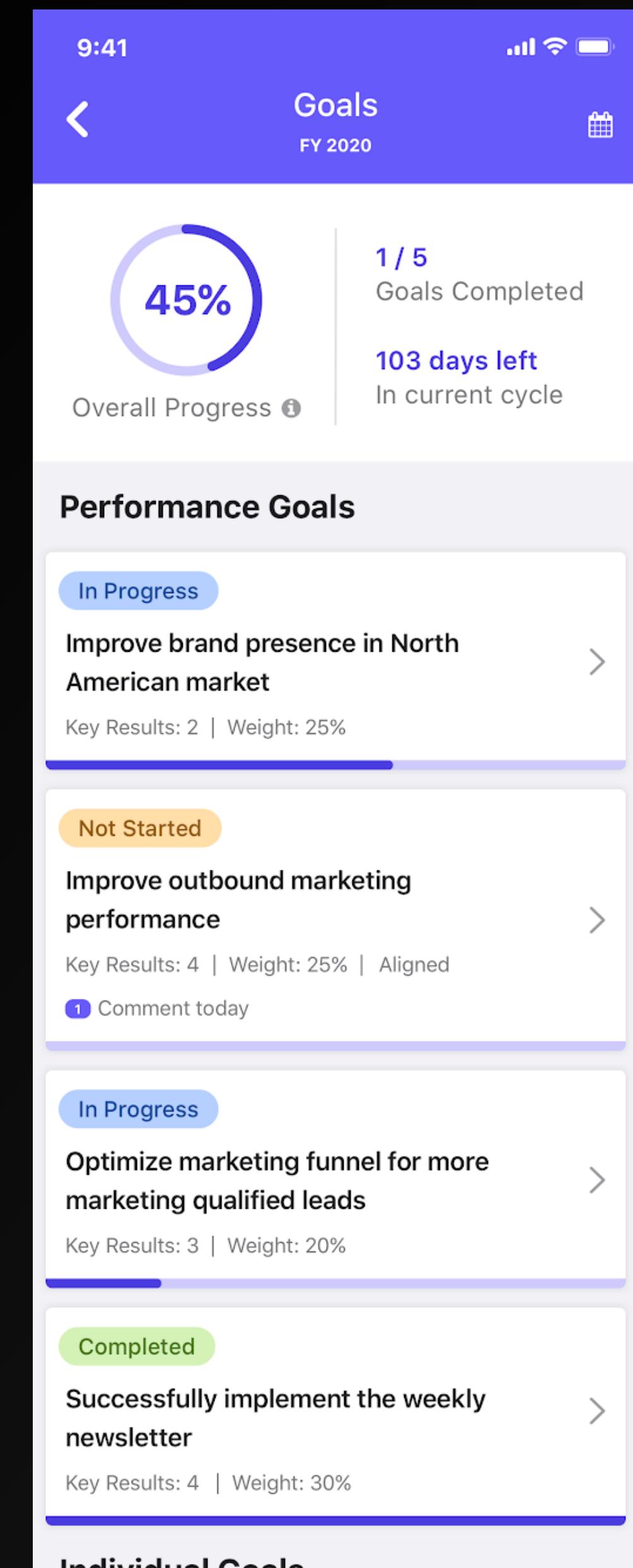
Initial Design



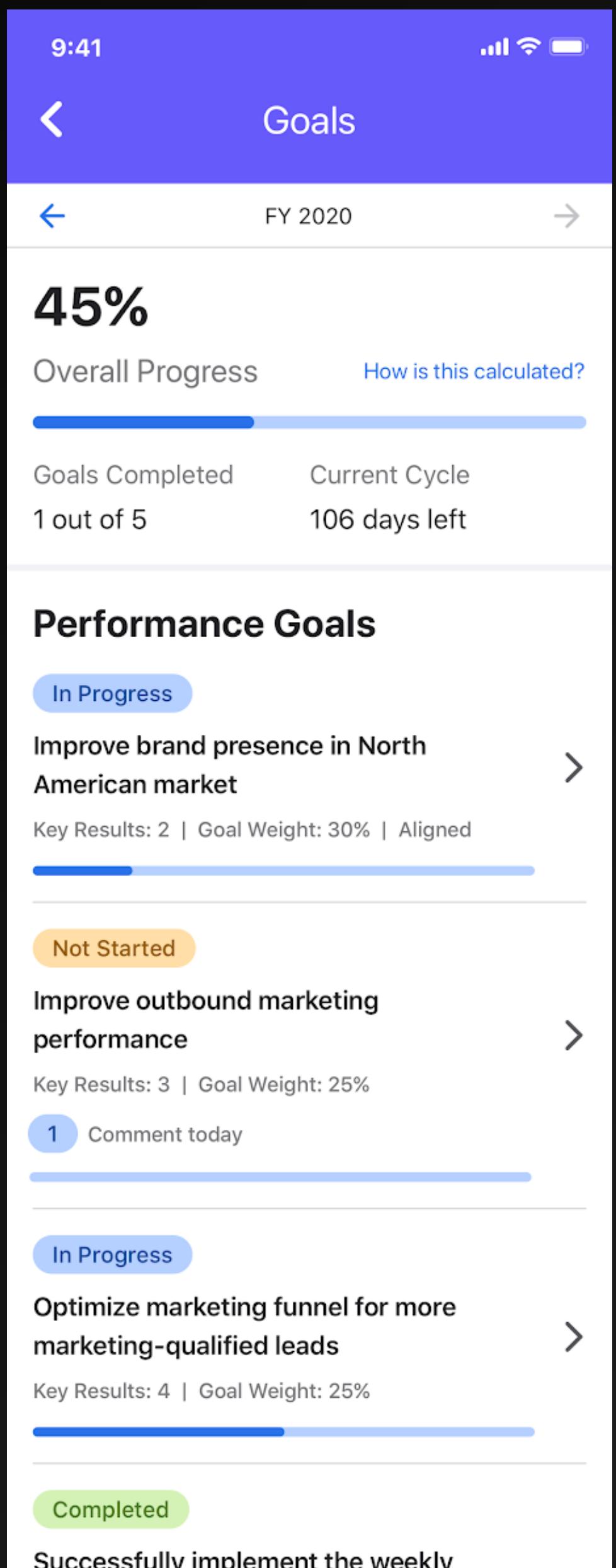
Final Design

Design Challenge 3

Balance constraints & good UX



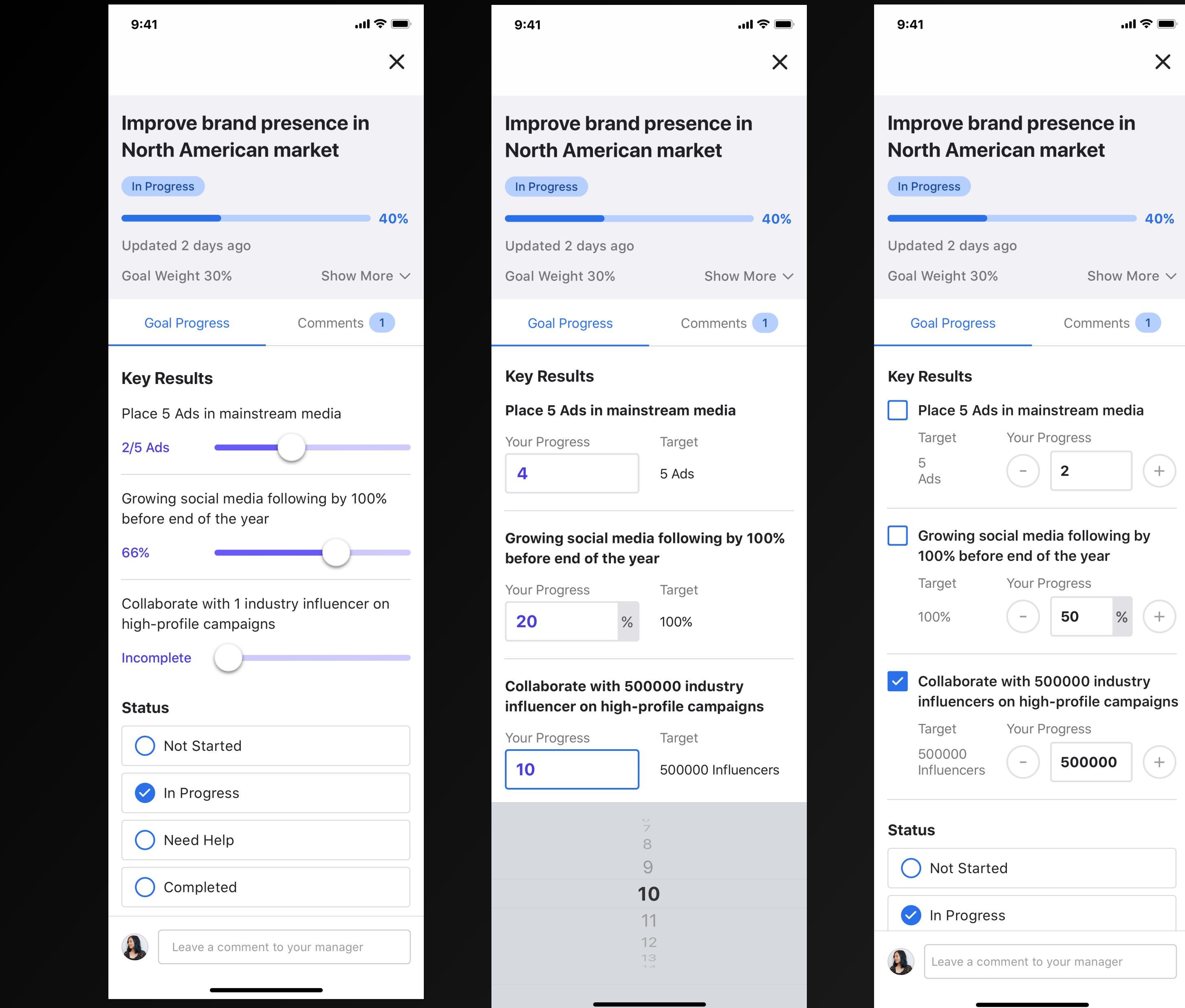
Initial Design



Final Design

Design Challenge 3

Balance constraints & good UX



Initial Design

Final Design

Design Challenge 4

The Holistic Experience

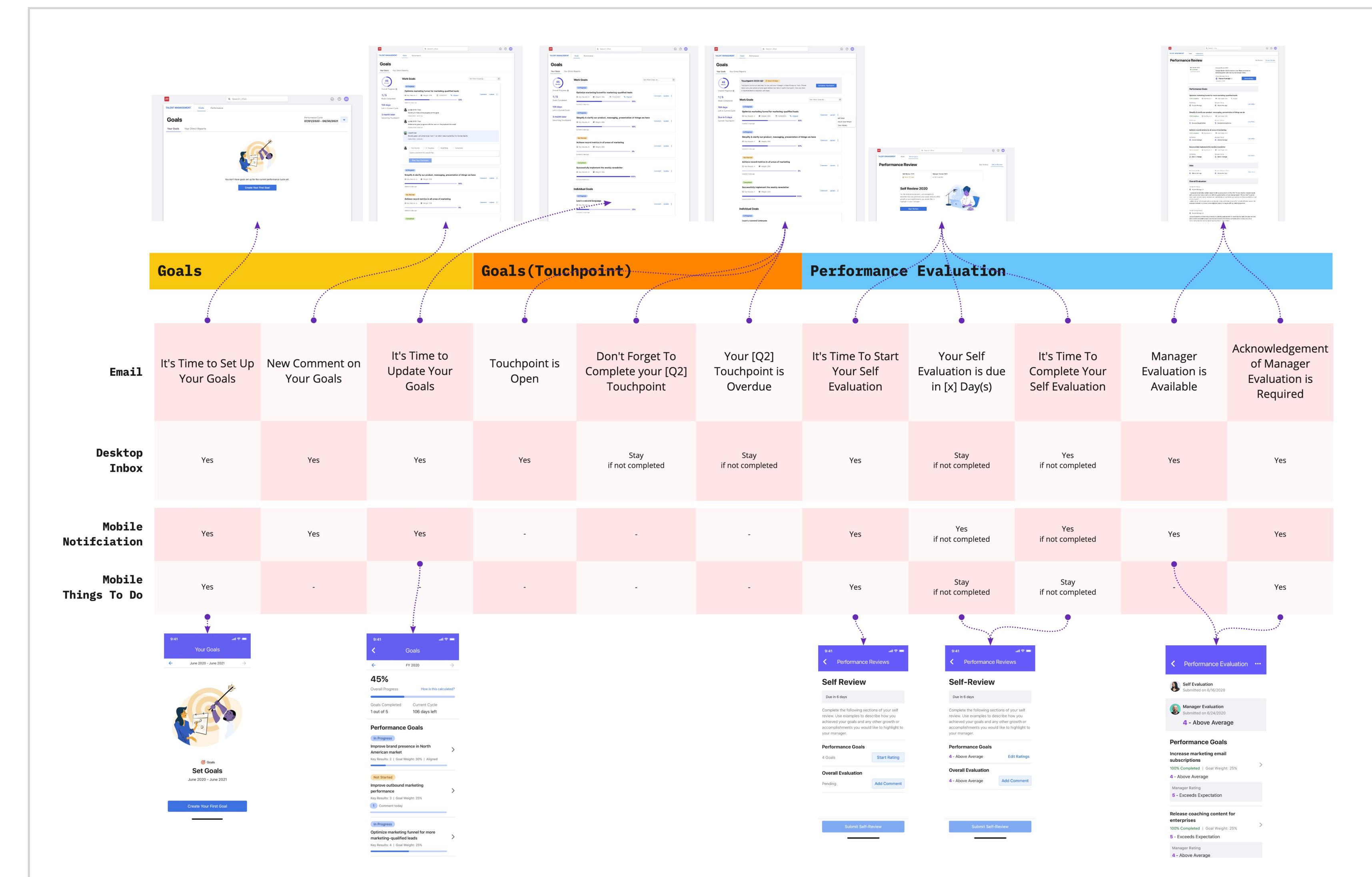
What brings users to
Goals Management app

Goals Management app

VS.
the entire eco-system

Motivated users

VS.
Unmotivated users

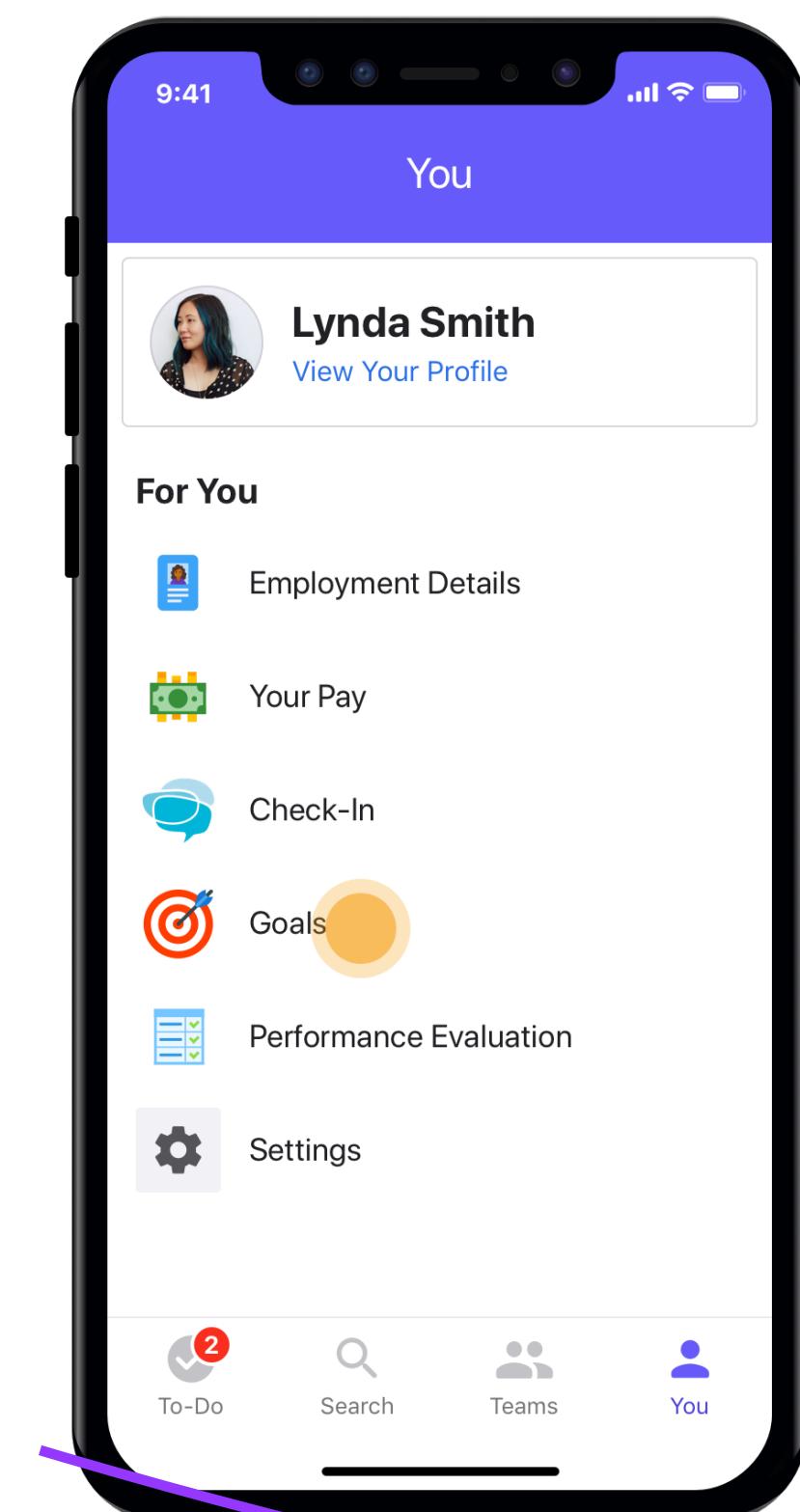
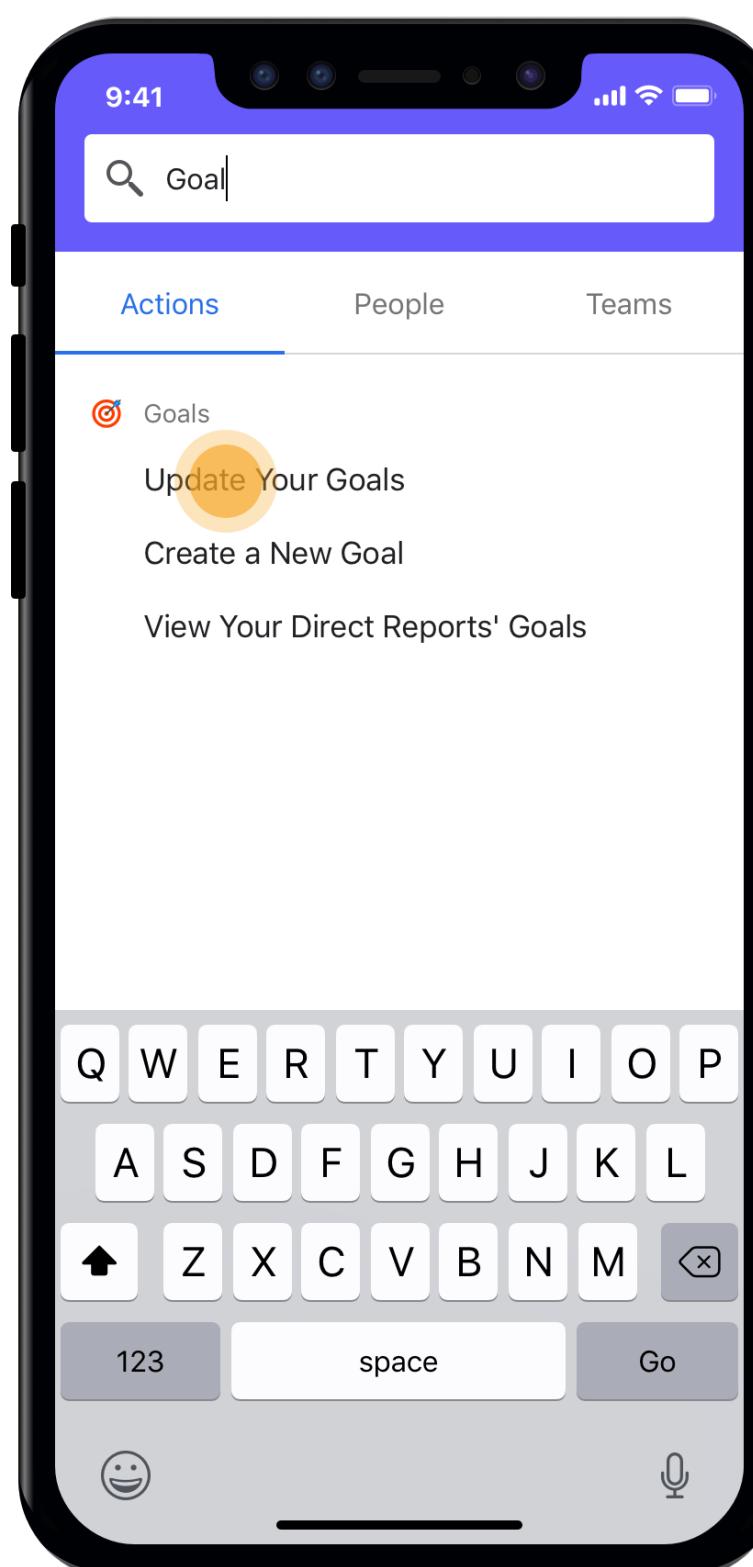


Notifications - Goals & Performance - Employee Experience

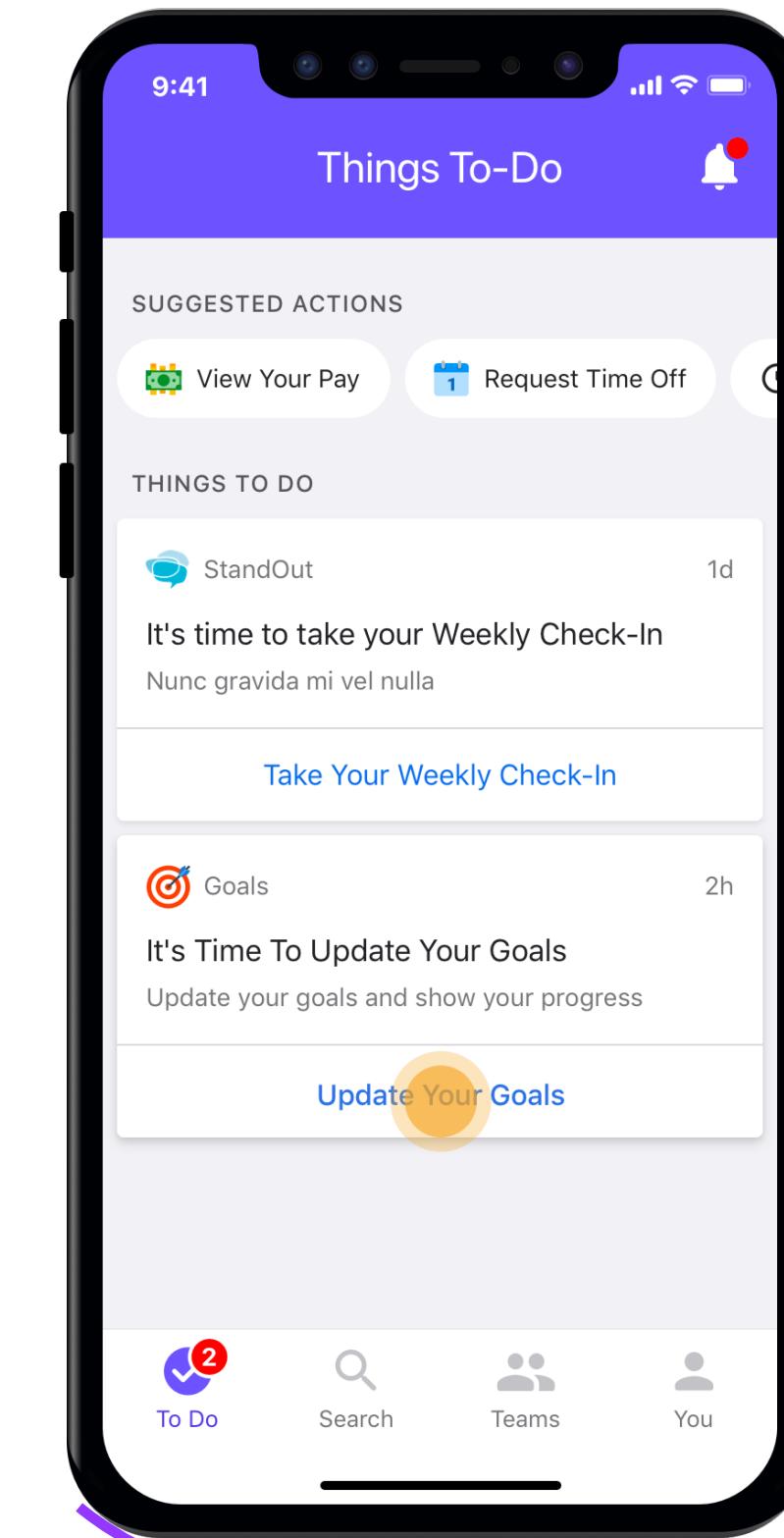
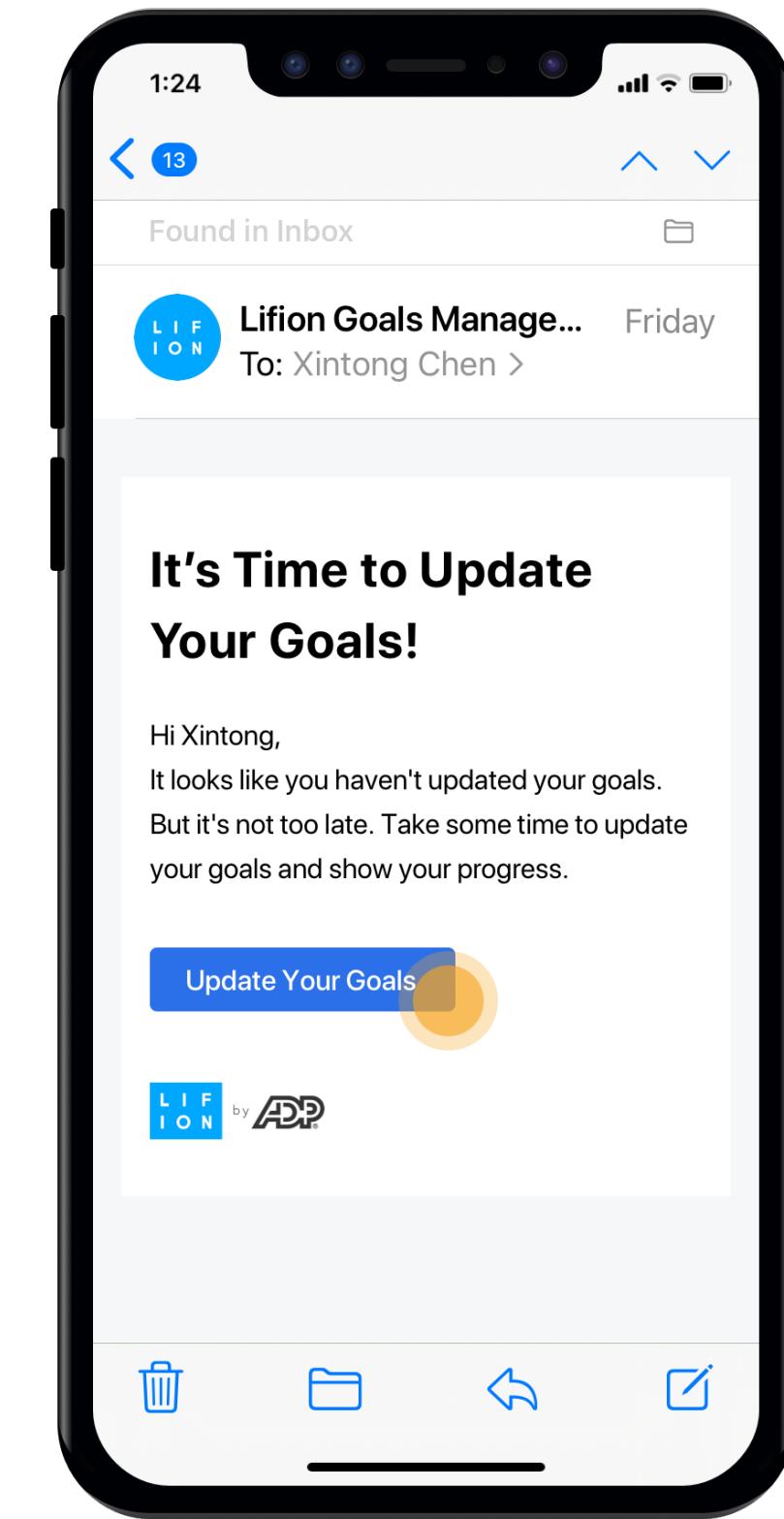
Design Challenge 4

The Holistic Experience

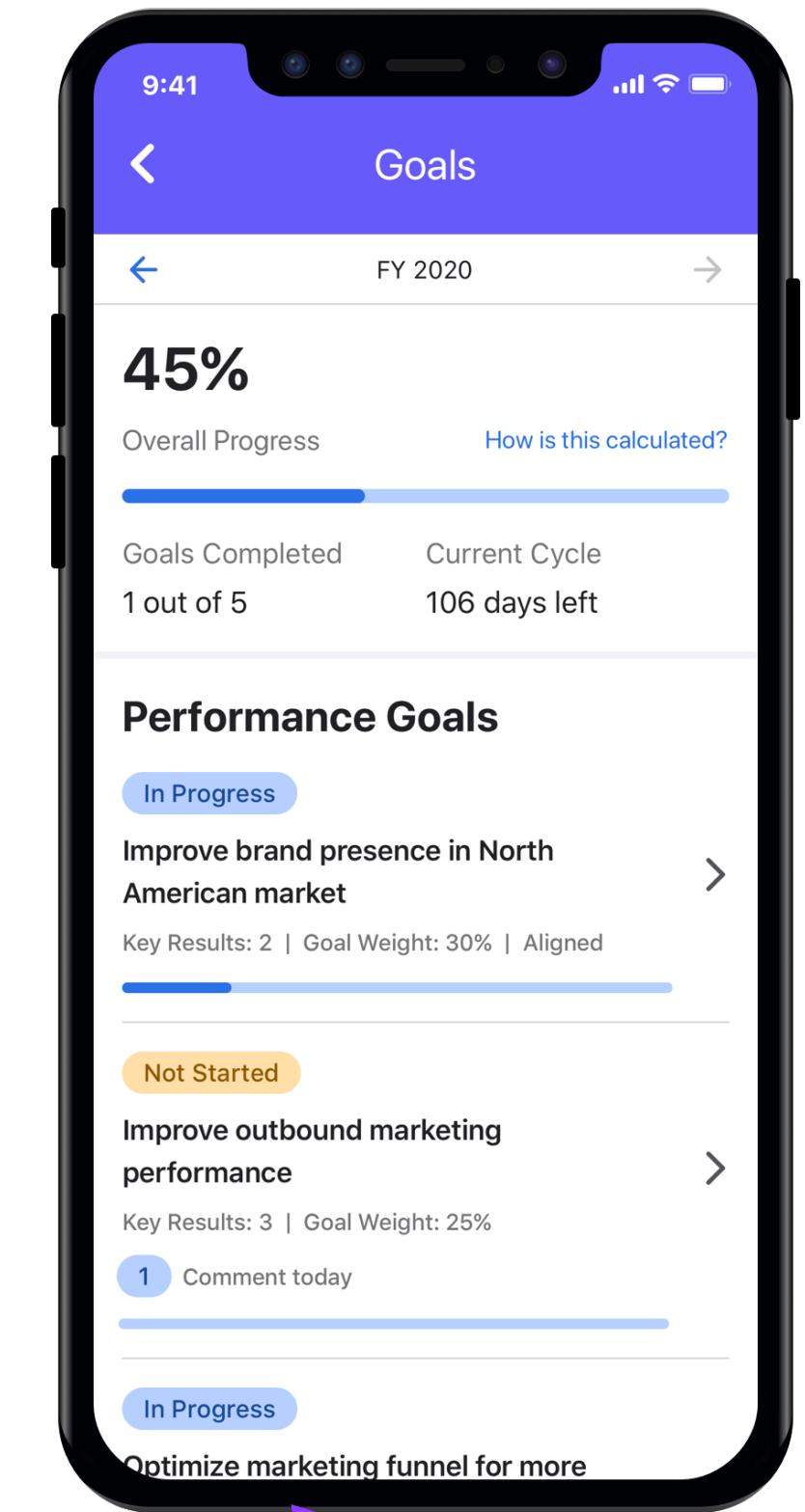
Motivated employees
(search, profile)



Unmotivated employees
(notifications)



Goals Management



Collaboration 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. You can check the status of your goals and either update the key results, or leave a comment on your manager's behalf. If you need help on any goals, make sure you bring it up to your manager.

Update Goals for Q2 Touchpoint

1 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"

1 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!

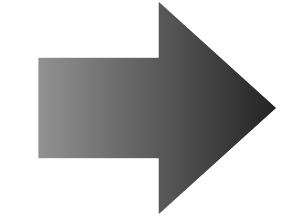
Measure Design Success

Ease of use

I thought this system was easy to use

1 - Strongly disagree

5 - Strongly agree

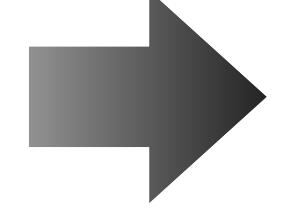


User confidence

I felt very confident using this system

1 - Strongly disagree

5 - Strongly agree



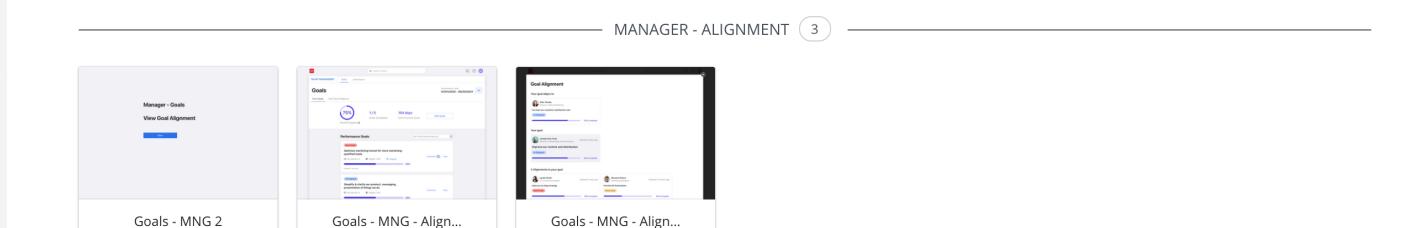
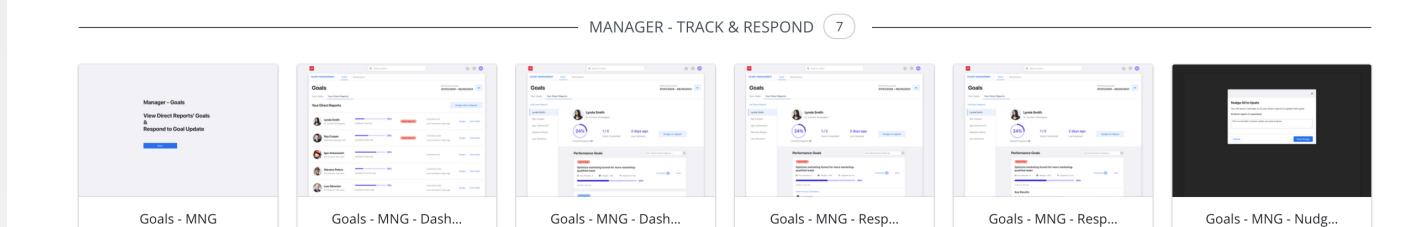
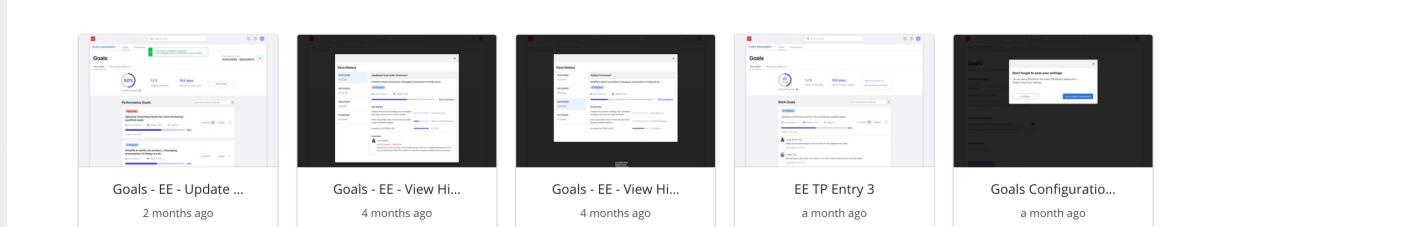
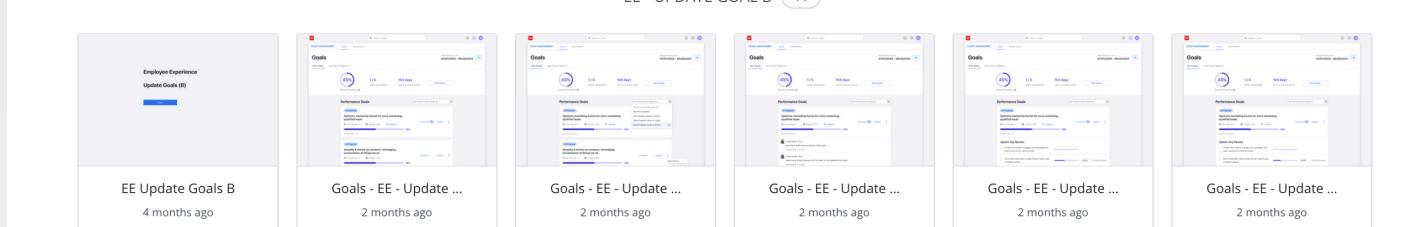
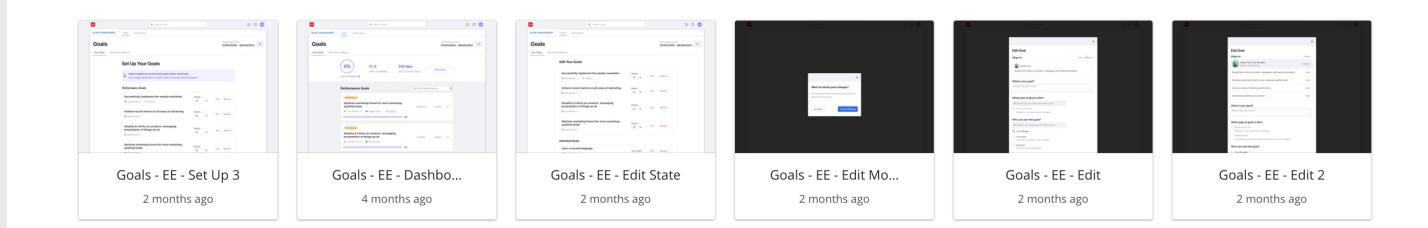
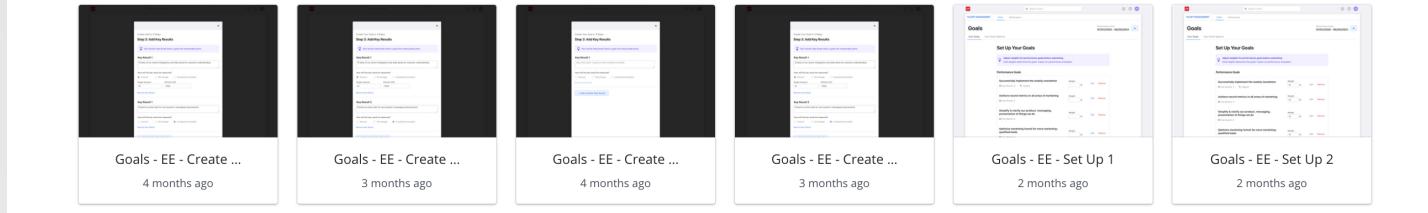
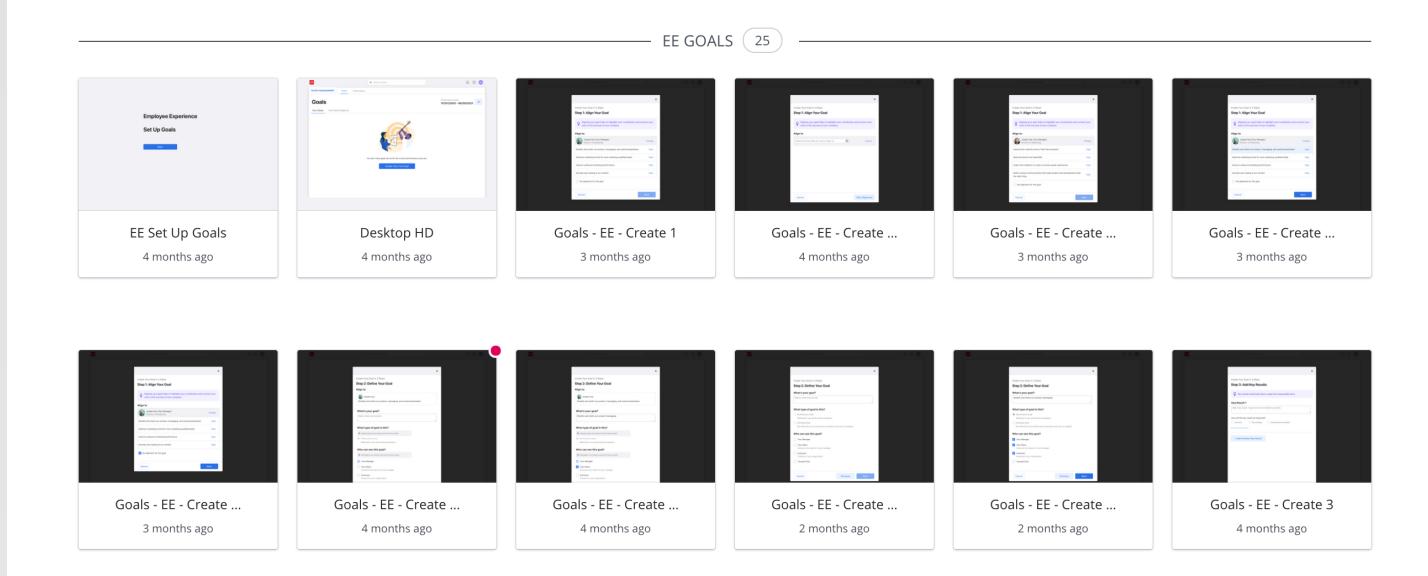
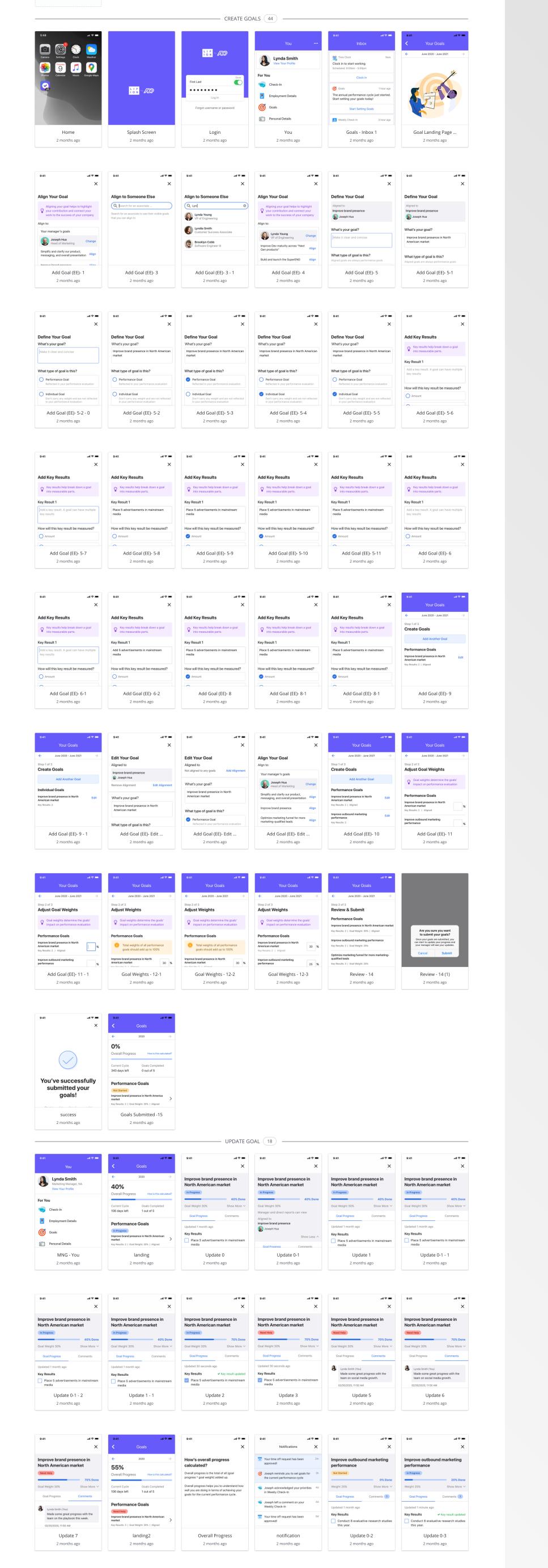
Develop & Deliver

DELIVER

Desktop - 1 client in 10/2020
Mobile - 2 clients in 3/2021

NEXT STEPS

Kick off V2 features (approval,
cascading goals, touchpoint ...)



Thank You!

<http://xintongchen.github.io>