

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 shows 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%. 1 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



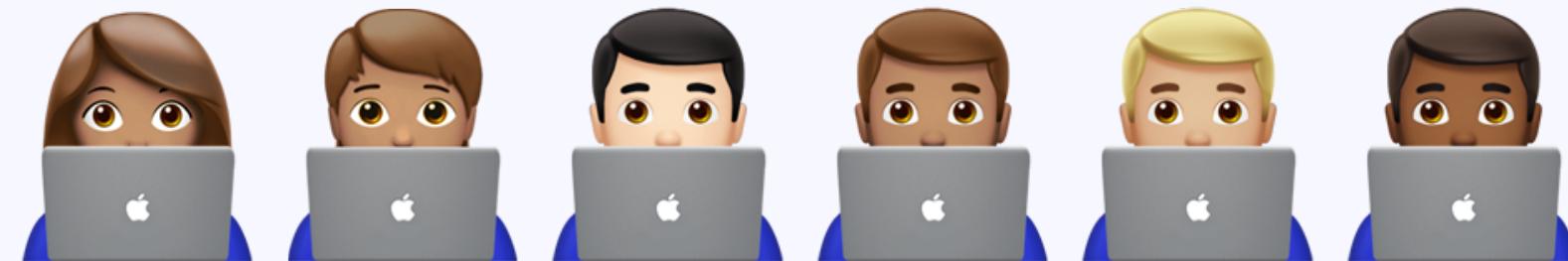
UX Writer



Design System Designers

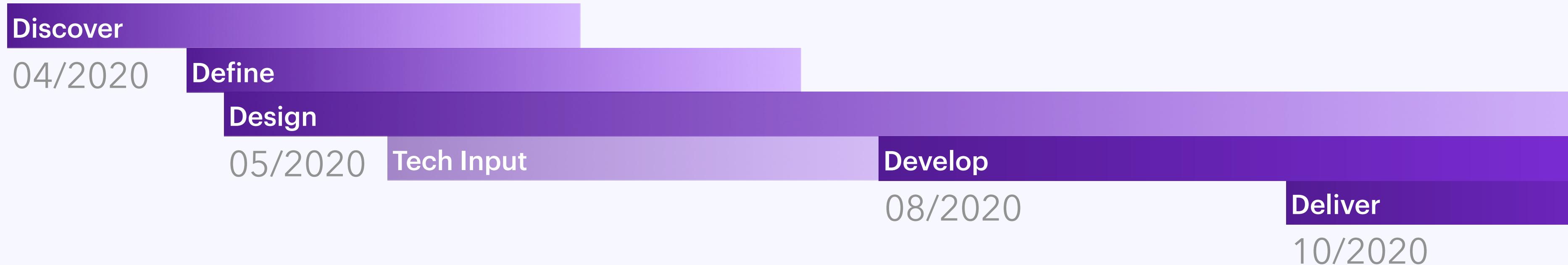
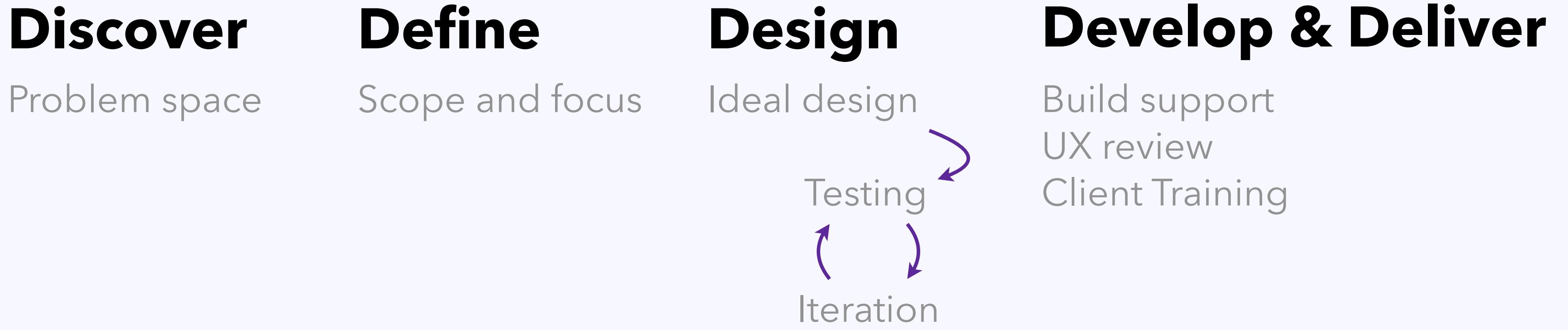


Beacon
our design system



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

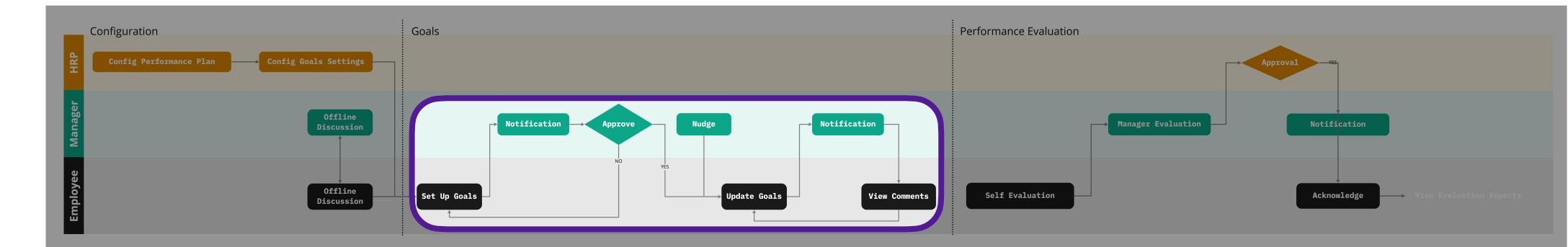


Employees*

Careerbuilder Lynda

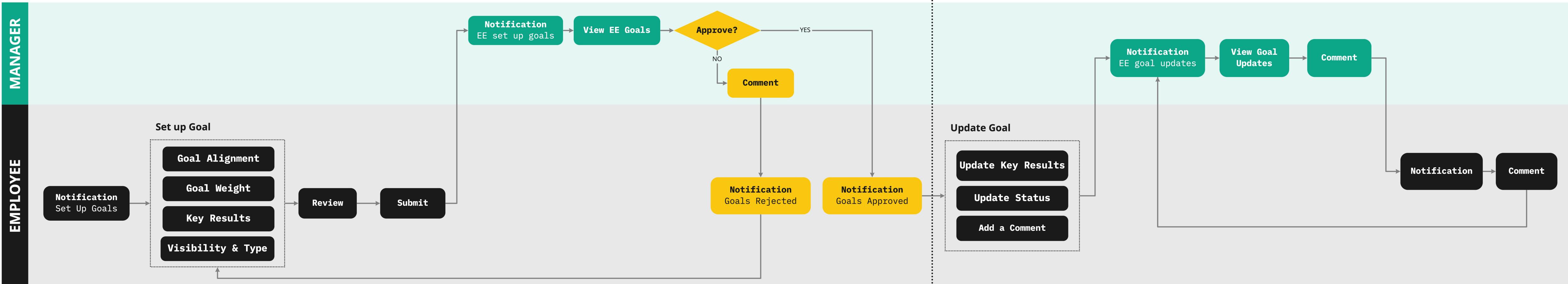
Define V1 Scope

What we must have
What's the foundation



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

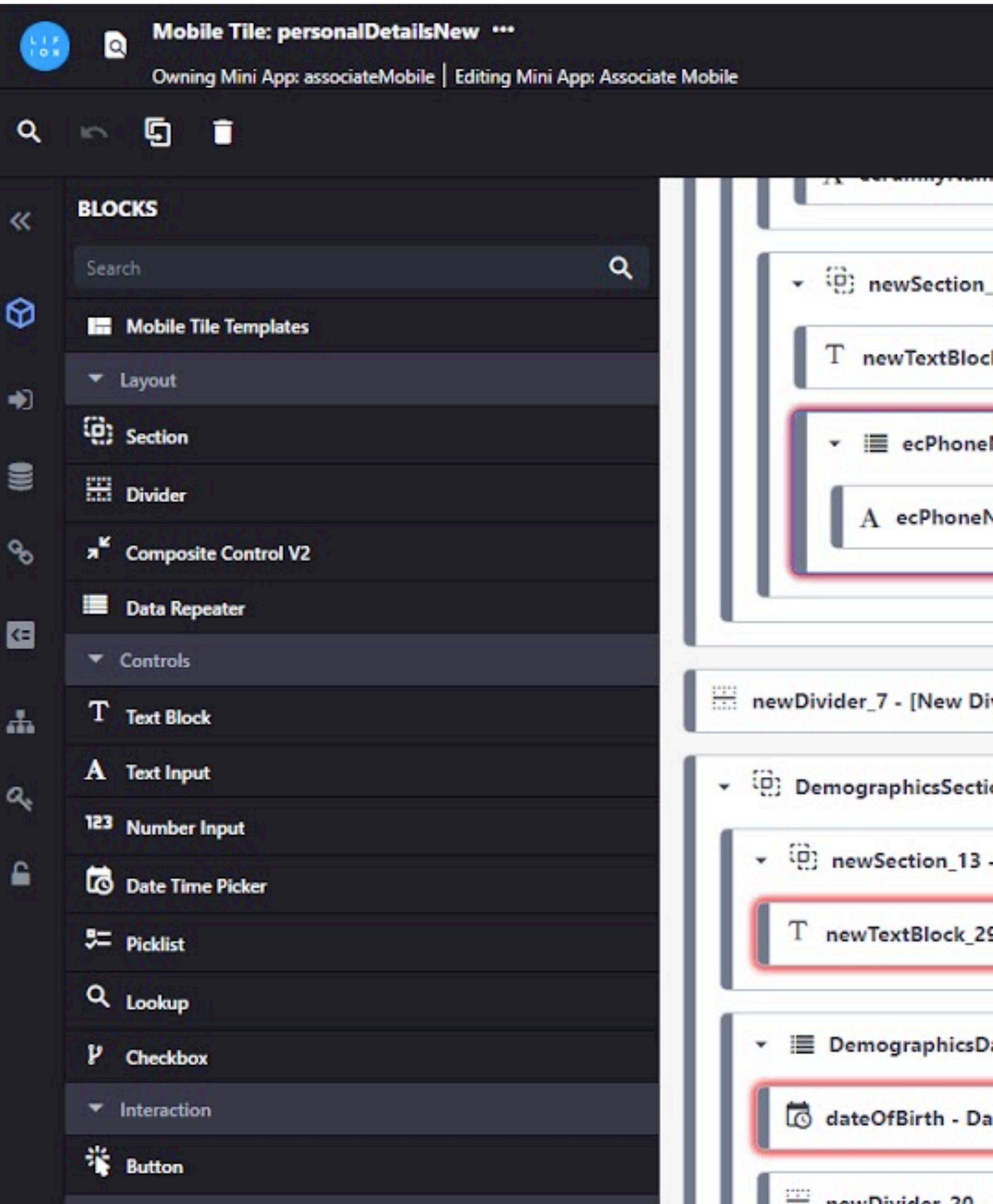
User confidence (4+)

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

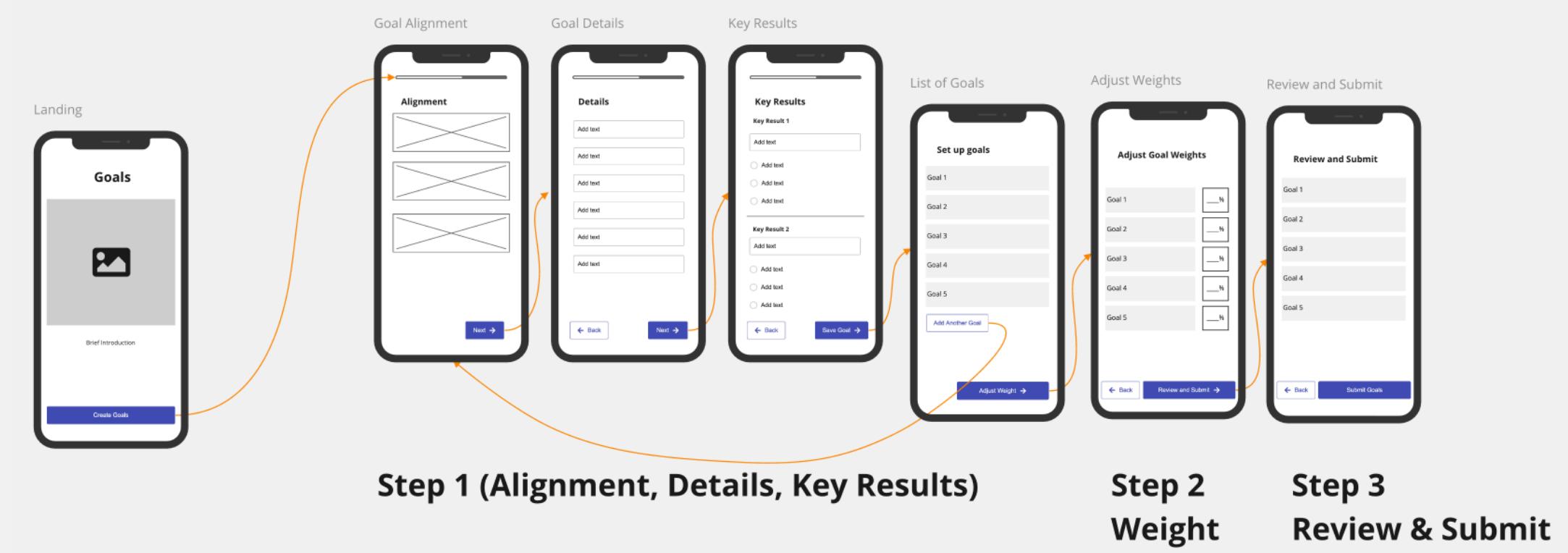
Pixel perfect

Design Challenge

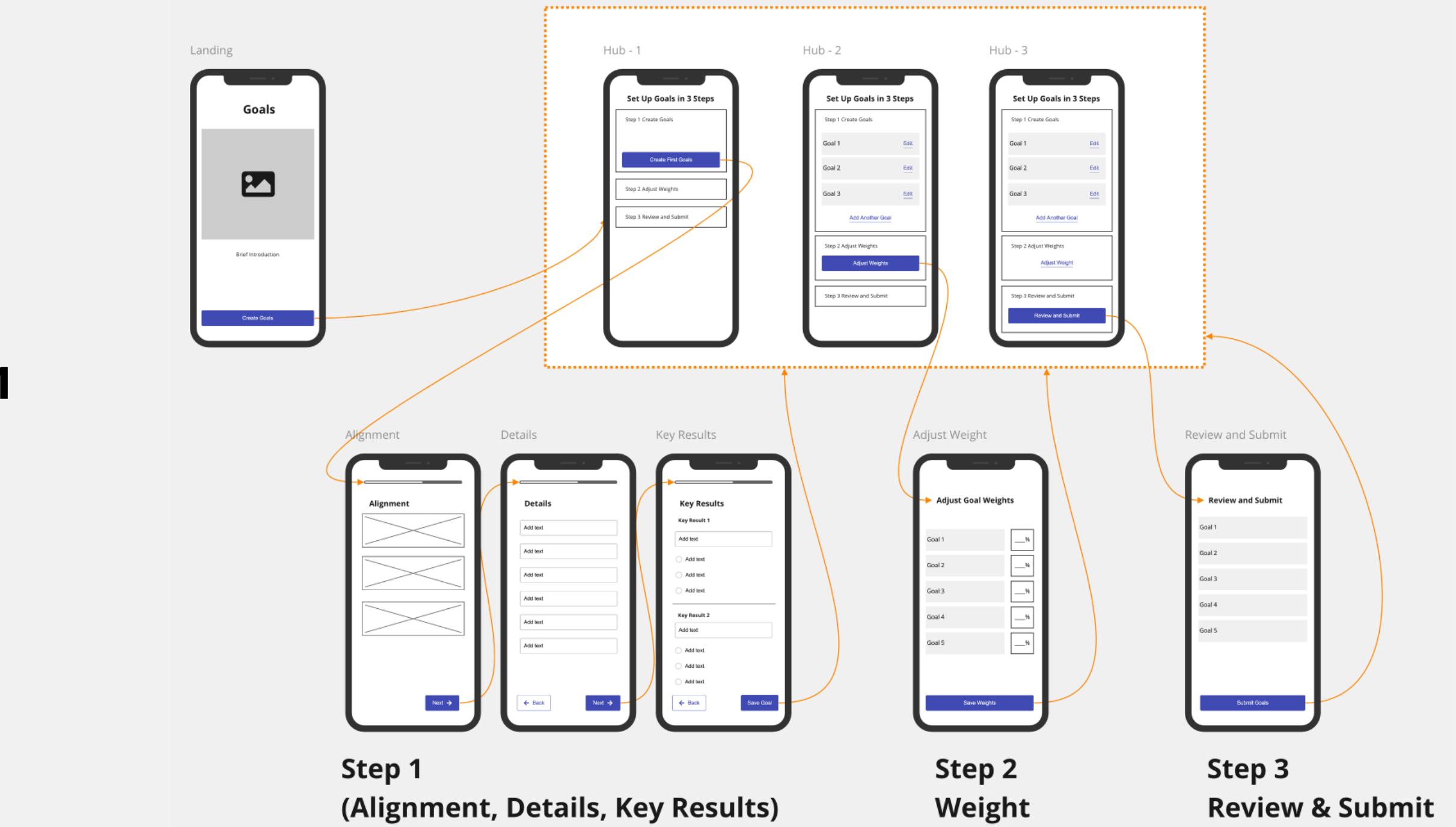
#1

Navigation

Exploration 2 Linear Process



Exploration 1 Hub Screen



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

- Step 1: Align Your Goal**
 - Header: "Align Your Goal".
 - Text: "Aligning your goal helps to highlight your contribution and connect your work to the success of your company".
 - Section: "Align to: Your manager's goals".
 - User: Joseph Hua, Head of Marketing.
 - Change button.
 - List:
 - Simplify and clarify our product, messaging, and overall presentation [Align](#)
 - Improve brand presence [Align](#) (highlighted with an orange circle)
 - Optimize marketing funnel for more marketing-qualified leads [Align](#)
 - Understand our customers and analyze their behavior [Align](#)
 - Buttons: "Skip" and "Next" (highlighted with an orange circle).
- Step 2: Define Your Goal**
 - Header: "Define Your Goal".
 - Text: "Aligned to Improve brand presence".
 - Section: "Joseph Hua".
 - Section: "What's your goal?".
 - Text: "Improve brand presence in North American market".
 - Section: "What type of goal is this?".
 - Text: "Aligned goals are always performance goals".
 - Section: "Performance Goal".
 - Text: "Reflected in your performance evaluation".
 - Section: "Who can see this goal?".
 - Text: "Managers can always see performance goals".
 - List:
 - Your Manager
 - Your Peers
 - Everyone who reports to your manager
 - Everyone
 - Everyone in your organization
 - Buttons: "Previous", "Next" (highlighted with an orange circle), and "Save Goal" (highlighted with an orange circle).
- Step 3: Add Key Results**
 - Header: "Add Key Results".
 - Text: "Key results help break down a goal into measurable parts".
 - Section: "Key Result 1".
 - Text: "Place 5 advertisements in mainstream media".
 - Section: "How will this key result be measured?".
 - Amount
 - Percentage
 - Complete / Incomplete
 - Text: "Target Amount: 5", "Amount Unit: Advertisements".
 - Text: "Remove Key Result".
 - Section: "Key Result 2".
 - Text: "Boost brand recognition by 50%".
 - Buttons: "Previous", "Next" (highlighted with an orange circle), and "Save Goal" (highlighted with an orange circle).
- Step 4: Create Goals**
 - Header: "Your Goals".
 - Text: "Step 1 of 3".
 - Section: "Create Goals".
 - Text: "Add Another Goal".
 - Section: "Performance Goals".
 - Text: "Improve brand presence in North American market".
 - Text: "Key Results: 2 | Aligned".
 - Text: "Edit".
 - Text: "Adjust Goal Weights".
 - Text: "Goals are not submitted yet, please adjust weights before submission".

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!

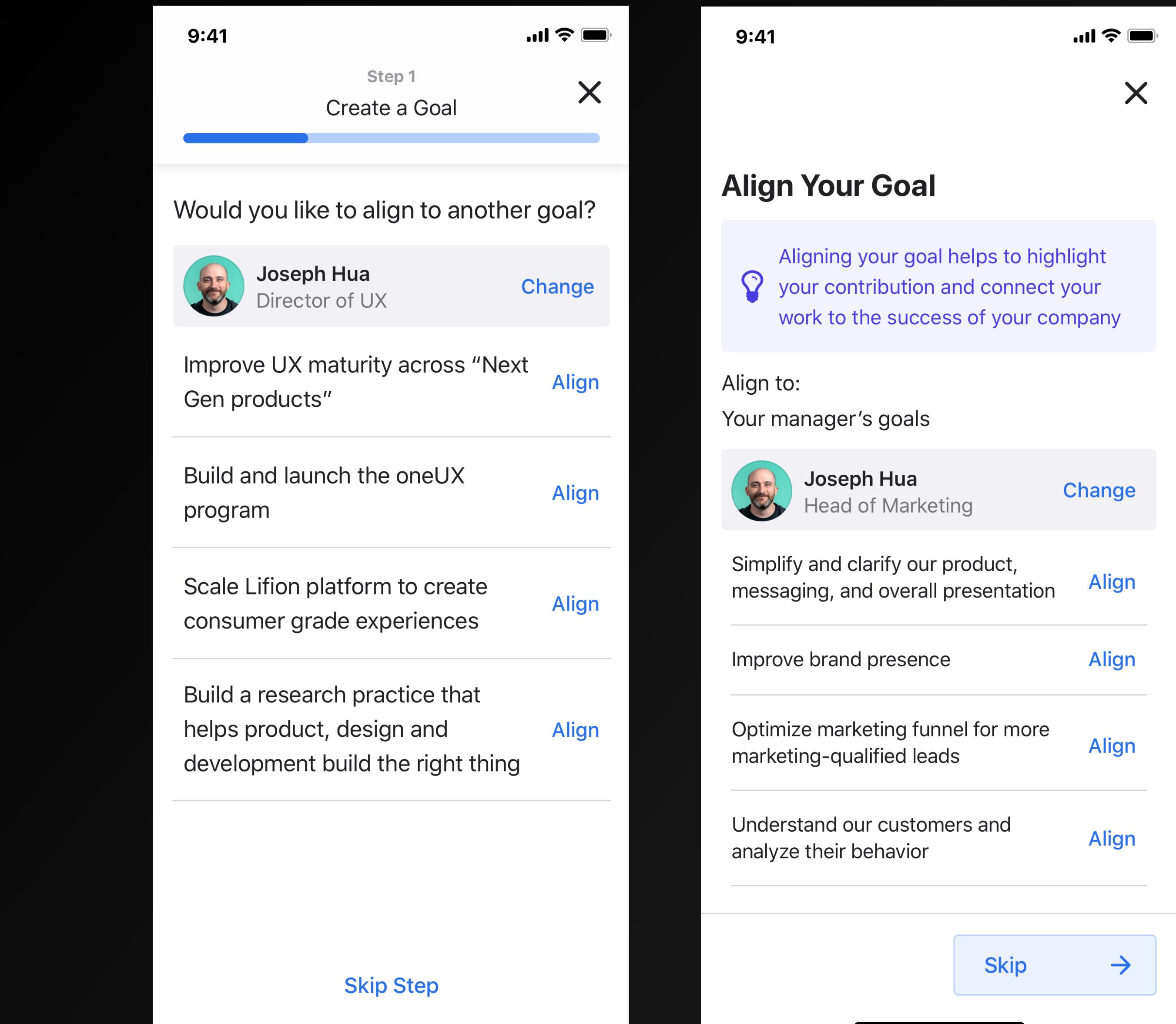
View Your Goals

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

#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**

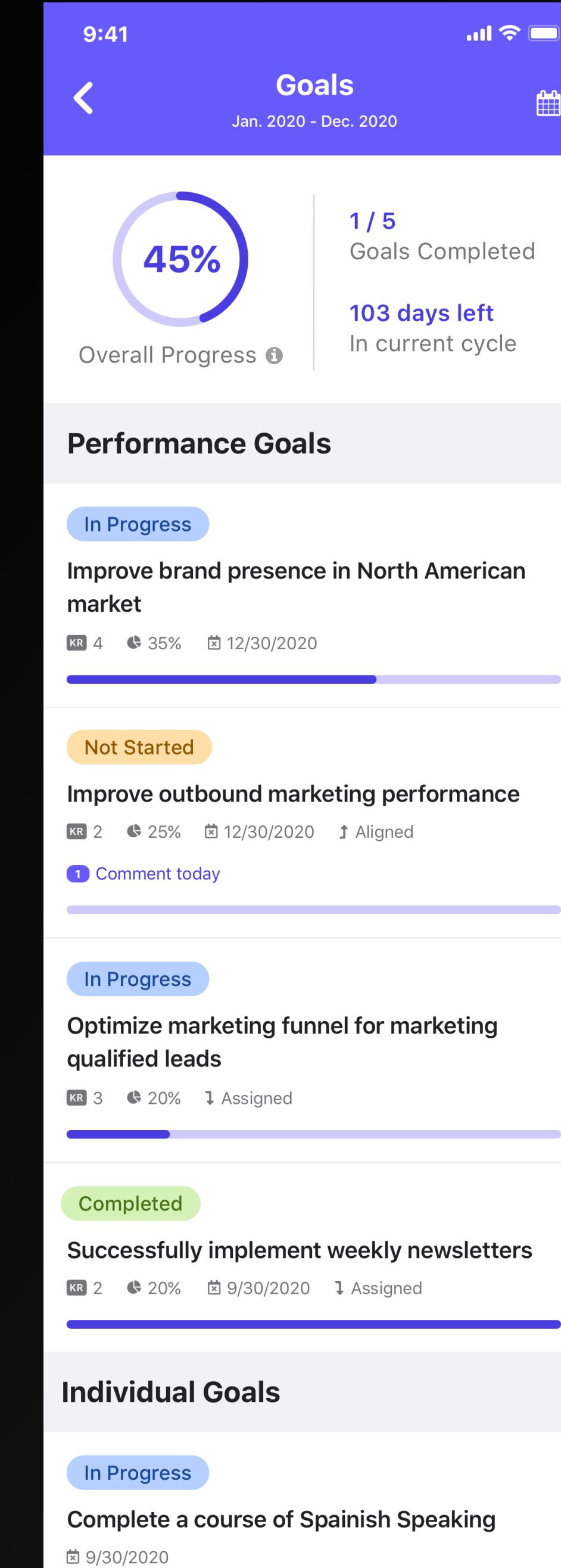
This screen shows the user adding key results to their goal. It includes a tip about key results being measurable parts, a section for "Key Result 1" (set to "Place 5 advertisements in mainstream media"), and a section to measure the key result:
 - Amount (selected)
 - Percentage
 - Complete / IncompleteBelow 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).

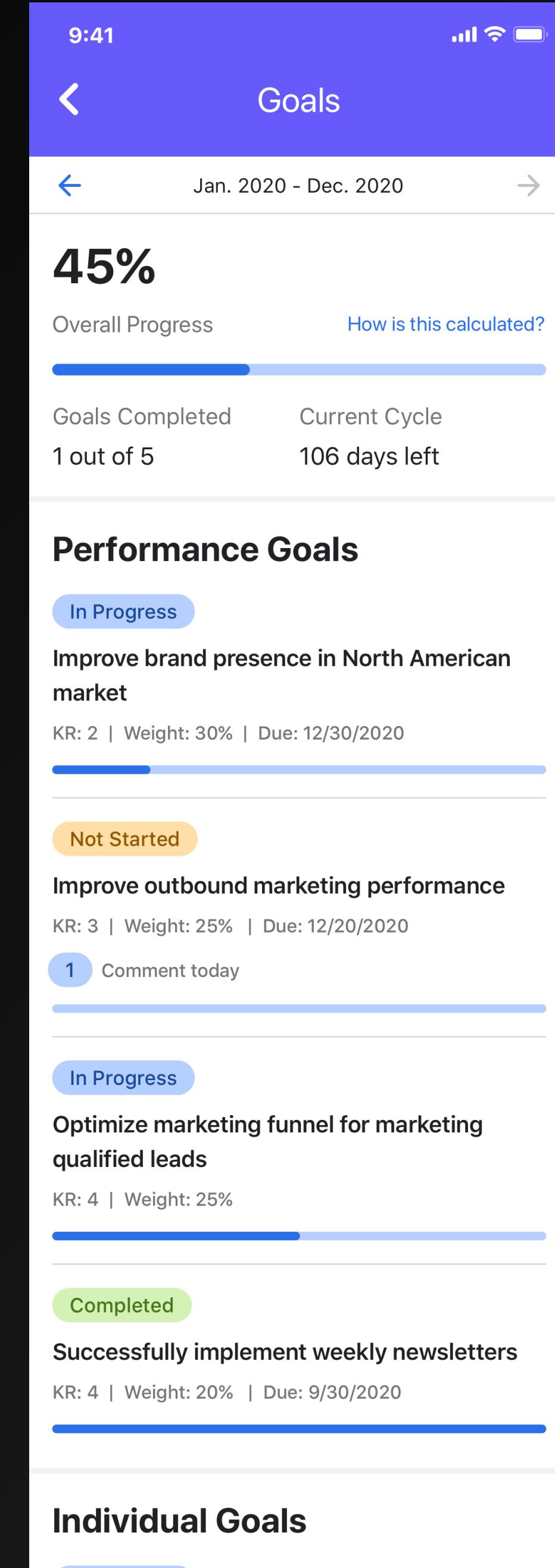
Design Challenge

#3

Balance constraints and
good user experience



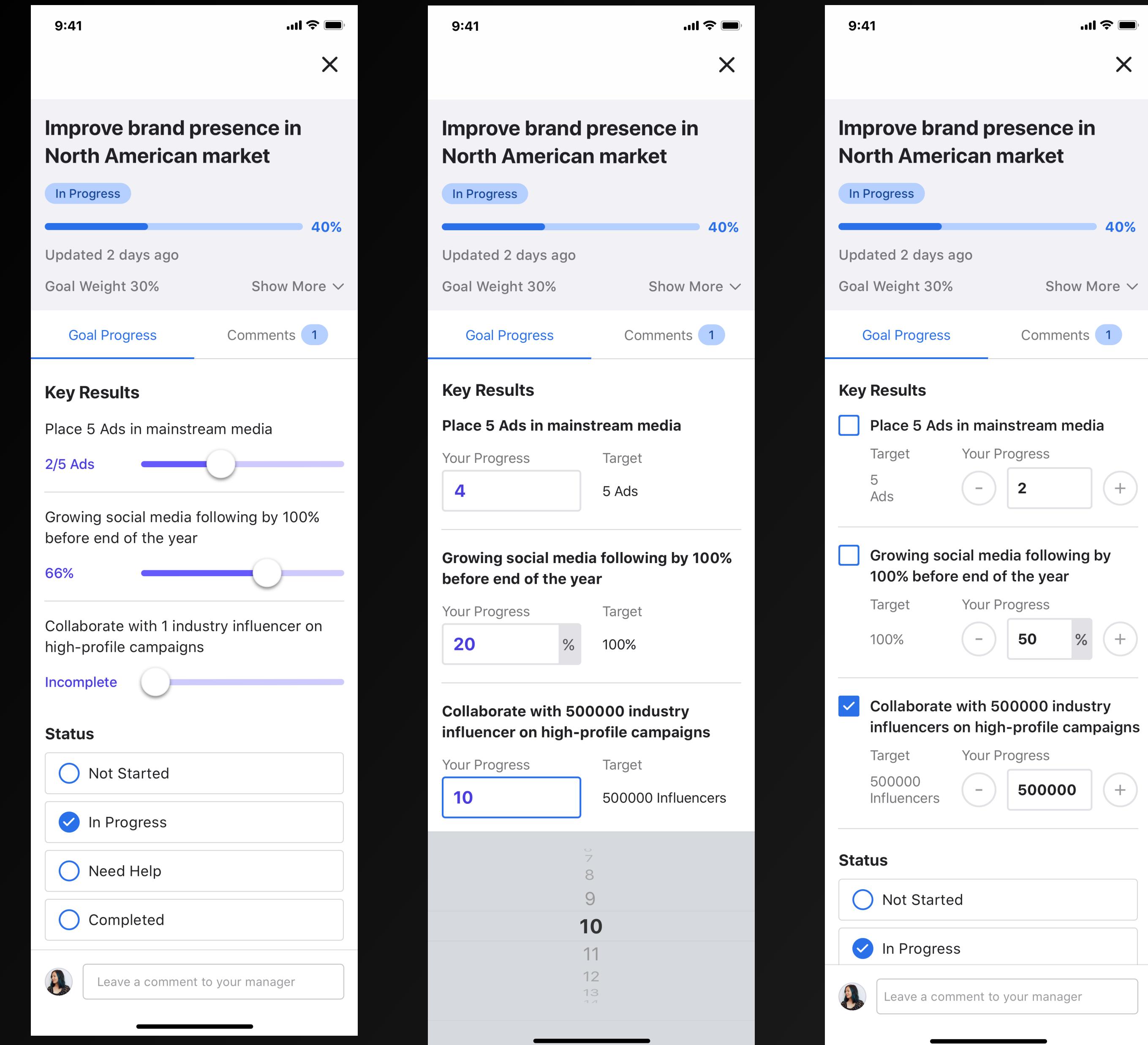
Initial Design



Final Design

Design Challenge

#3
Balance constraints and
good user experience



Initial Design

Final Design

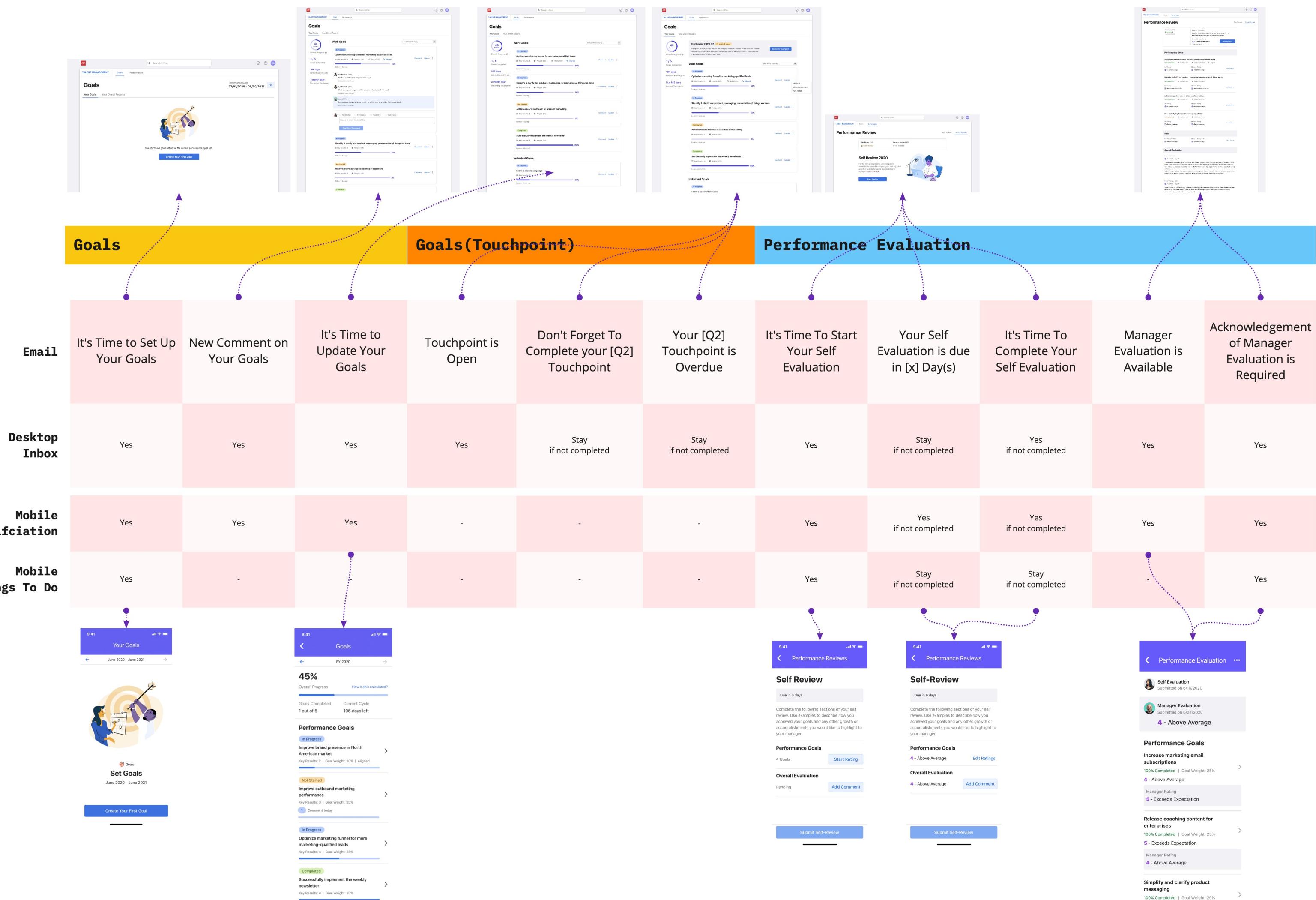
Design Challenge

#4

Design a Holistic Experience

Goals vs. entire HR ecosystem

Notification design



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!

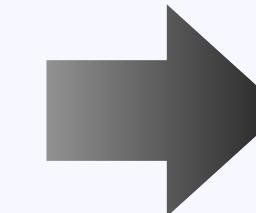
Ease of use (4+)

I thought this system was easy to use

1 - Strongly disagree

5 - Strongly agree

4.21



4.38

Design Success

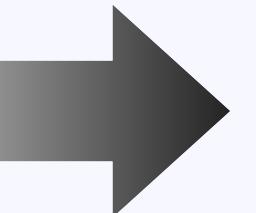
User confidence (4+)

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 the text "Step 1 of 3". Below this, the main title "Align Your Goal" is centered. A callout box with a blue icon and the text "Aligning your goal helps to highlight your contribution and connect your work to the success of your company." is displayed. At the bottom of the dialog, there are three radio buttons: "Align to an Associate" (selected), "Align to a Company Goal", and "Don't Need Alignment". Below the radio buttons is a list of five items, each with a "Change" link next to the author's name and profile picture:

- Joseph Hua (Your Manager) Director of Marketing: Simplify and clarify our product, messaging, and overall presentation. [Align](#)
- Joseph Hua (Your Manager) Director of Marketing: Optimize marketing funnel for more marketing-qualified leads. [Align](#)
- Joseph Hua (Your Manager) Director of Marketing: Improve outbound marketing performance. [Align](#)
- Joseph Hua (Your Manager) Director of Marketing: Activate user-testing of our content. [Align](#)

At the bottom of the dialog are two buttons: "Cancel" and "Next".

The screenshot shows the "Set Up Your Goals" page. The top navigation bar includes "TALENT MANAGEMENT", "Goals" (which is selected), and "Performance". The main title "Goals" is centered above the "Your Goals" tab, which is also selected. Below the title, there is a message: "Please adjust weights for performance goals before submitting. Goal weights determine the impact of a goal on performance evaluation." The "Performance Goals" section lists four goals with their weights and key results:

Goal Description	Weight	Key Results	Last Update	Status	Action
Successfully implement the weekly newsletter	15 %	3	09/09/2020	Aligned	Edit Remove
Achieve record metrics in all areas of marketing	15 %	4			Edit Remove
Simplify & clarify our product, messaging, and presentations	15 %	4	12/09/2020		Edit Remove
Improve customer satisfaction rating	20 %	4		Assigned by Joseph	Edit Remove

A warning message at the bottom states: "⚠ Total weight should add up to 100%. Total Weight: 65 %". At the bottom of the page are two buttons: "Add Another Goal" and "Submit Your Goals".

Desktop Experience

Lifion screenshot showing the Goals section under TALENT MANAGEMENT.

Overall Progress: 45 Percent

Performance Goals:

- In Progress:** Optimize marketing funnel for marketing-qualified leads (1/5 completed, 2 days ago, Aug. 28 2020). Overall progress: 50%. Key Results: 4, Weight: 25%, Due: 12/30/2021, Aligned. Updated 2 days ago.
- Need Help:** Simplify & clarify our product, messaging, and presentation (1/5 completed, 2 days ago, Aug. 28 2020). Overall progress: 50%. Key Results: 4, Weight: 25%. Updated 2 days ago.
- Not Started:** Achieve record metrics in all areas of marketing (0% completed, 2 days ago, Aug. 28 2020). Overall progress: 0%. Key Results: 4, Weight: 25%. Updated 2 days ago.
- Completed:** Successfully implement the weekly newsletter (100% completed, 01/01/2020). Overall progress: 100%. Key Results: 4, Weight: 25%, Assigned by Joseph. Updated 01/01/2020.

Buttons: Add New Goal, Comment, Update, More.

Lifion screenshot showing the Goals section under TALENT MANAGEMENT, with a modal open for the "Simplify & clarify our product, messaging, and presentation" goal.

Overall Progress: 45 Percent

Performance Goals:

- In Progress:** Optimize marketing funnel for marketing-qualified leads (1/5 completed, 2 days ago, Aug. 28 2020). Overall progress: 50%. Key Results: 4, Weight: 25%, Due: 12/30/2021, Aligned. Updated 2 days ago.

Update Key Results:

- Finalize the content strategy, key messages and topic structure for next 6 months (0% complete).
- 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 (radio button), In Progress (radio button selected), Need Help (radio button), Completed (radio button).

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.

Buttons: Update Your Goal, Cancel.

Develop Deliver

Desktop V1
Launched in 10/2020

Mobile V1
Aiming at 3/2021

Designing V2 features

