

# Goals Management

Led design and research for Goals

Management, which empowered individuals  
to set and track goals anytime and anywhere

The screenshot displays the 'Goals' section of the Lifion software. At the top, there's a navigation bar with tabs for 'Talent Management', 'Goals', and 'Performance Evaluation'. A search bar and some user icons are also at the top. The main content area is titled 'Goals' and includes sections for 'Your Goals' and 'Your Direct Reports'. A summary on the left shows 'Overall Progress' at 45%, 'Goals Completed' at 1/5, and 'Last Updated' at 2 days ago. There's a prominent 'Add New Goal' button. The main list contains four items under 'Performance Goals': 1. 'Optimize marketing funnel for marketing-qualified leads' (In Progress, 50% complete). 2. 'Simplify & clarify our product, messaging, and presentation' (Need Help, 50% complete). 3. 'Achieve record metrics in all areas of marketing' (Not Started, 0% complete). 4. 'Successfully implement the weekly newsletter' (Completed). Each item has details like key results, weight, due date, and alignment status. On the right side of the app, there's a sidebar with a 'FY 2020' filter and a 'Performance Goals' section. An iPhone on the right shows a mobile version of the 'Goals' screen, mirroring the desktop interface.



I'm designing at Lifion on the Talent Squad

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

## MY ROLE

Product Designer

- \* Lead design and research
- \* Explore meaningful mobile design process for Lifion UX Team

## MY TEAM

Product Owner

Design System Designers x2

UX Writer

Lifion Developers x6

## MY PROCESS

### Discover

problem space

### Define

scope and focus

### Design

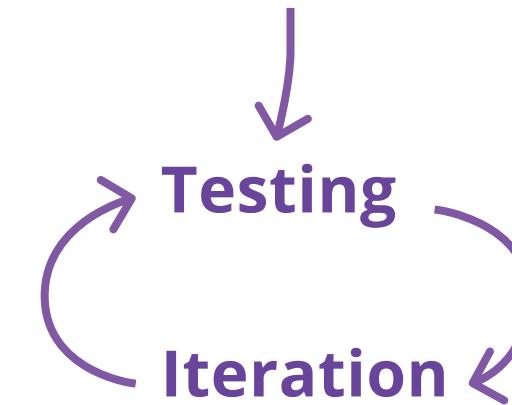
ideal user experience

### Develop

Support & UX Review

### Deliver

Client Training, Post Launch Research



## BUSINESS OBJECTIVE

Empower organizations to **maintain and grow talents**, so that Lifion can acquire more happy and referencable clients

## USERS

In most organizations, employees, managers and HR practitioners get involved into the process of managing goals

### Employees

Set and update goals  
Communicate progress

### Managers

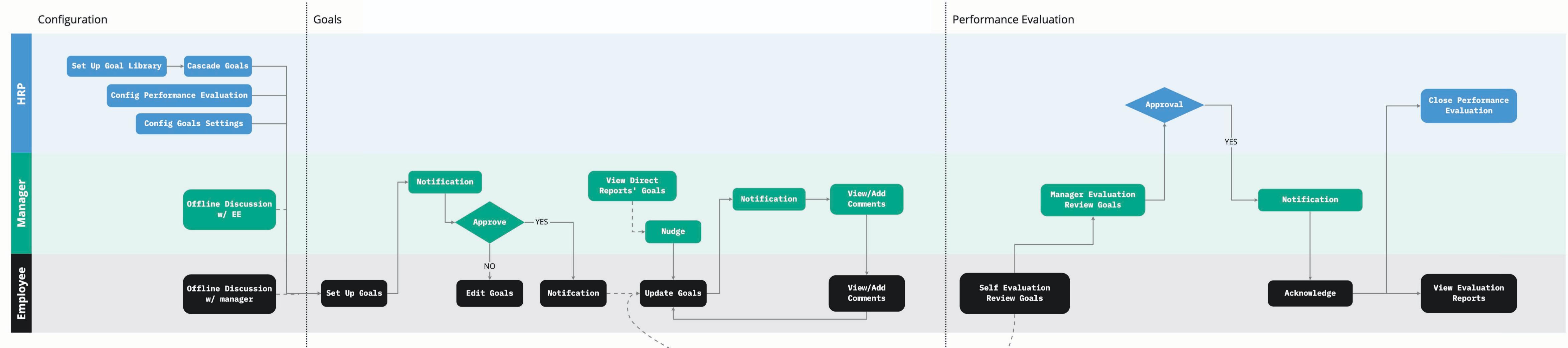
Keep up to date with direct reports' updates

### HR Practitioners

configure the organization's goals management process

## USER JOURNEY

I mapped out an end-to-end user flow to visualize the interactions among different types of users for my product manager and tech lead



## USER NEEDS

*I will take employee as an example to share my problem solving process*

*"Employees" refers to our clients' employees*

“ 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\***

Career Builder Lynda

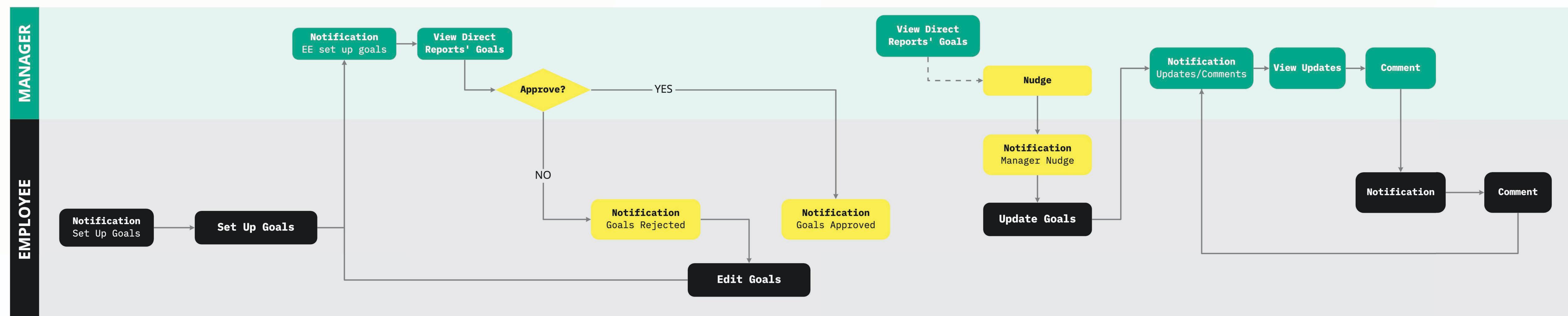
## DEFINE SCOPE FOR V1

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

Out of V1

Manager V1

Employee V1



## WHY MOBILE

Updating goals and commenting on goals are **high frequency employee self service** flows. Users should be able to do it wherever and whenever they need.

**Non-office workers**, like truck drivers or fitness trainers, may not have access to laptops during work time.

## **DEFINE DESIGN SUCCESS METRICS**

### **Ease of Use**

Lifion targets enterprise organizations that tend to have older workforce who are not tech savvy.

### **User Confidence**

This is an employee self service experience. Users should feel confident using the system to set/track goals without support/training.

## TECHNICAL CONSTRAINTS

Lifion's mobile design system is still in early stage. We have very limited mobile components available in our development platform

The screenshot shows the 'Mobile Tile: personalDetailsNew' interface in the Lifion mobile tile editor. The top bar displays the title and navigation links. On the left, the 'BLOCKS' palette lists various mobile components: Mobile Tile Templates, Layout (Section, Divider, Composite Control V2, Data Repeater), Controls (Text Block, Text Input, Number Input, Date Time Picker, Picklist, Lookup, Checkbox), Interaction, and Button. A search bar is at the top of the palette. To the right, the main workspace shows a hierarchical structure of components. A 'newSection\_33 - [New Section]' contains a 'newTextBlock\_7 -' component, which itself contains an 'ecPhoneNumber - [EC Phone Numbers]' component with a sub-item 'A ecPhoneNumber - [EC Phone Number]'. Below this is a 'newDivider\_7 - [New Divider]'. Another section, 'DemographicsSection - [Demographics]', contains a 'newSection\_13 - [New Section]' with a 'newTextBlock\_29 - Demographics' component, and a 'DemographicsDataRepeater - [DemographicsDataRepeater]' component containing a 'dateOfBirth - Date of Birth' item. At the bottom is a 'newDivider\_20 - [New Divider]' component.

# Explore a mobile design process that works for Lifion

Goals Management is one of the first few mobile experience we are building at Lifion. Given the technical constraints we have, as a team we needed to figure out what mobile design process works for us; that's part of my responsibility when driving this project.



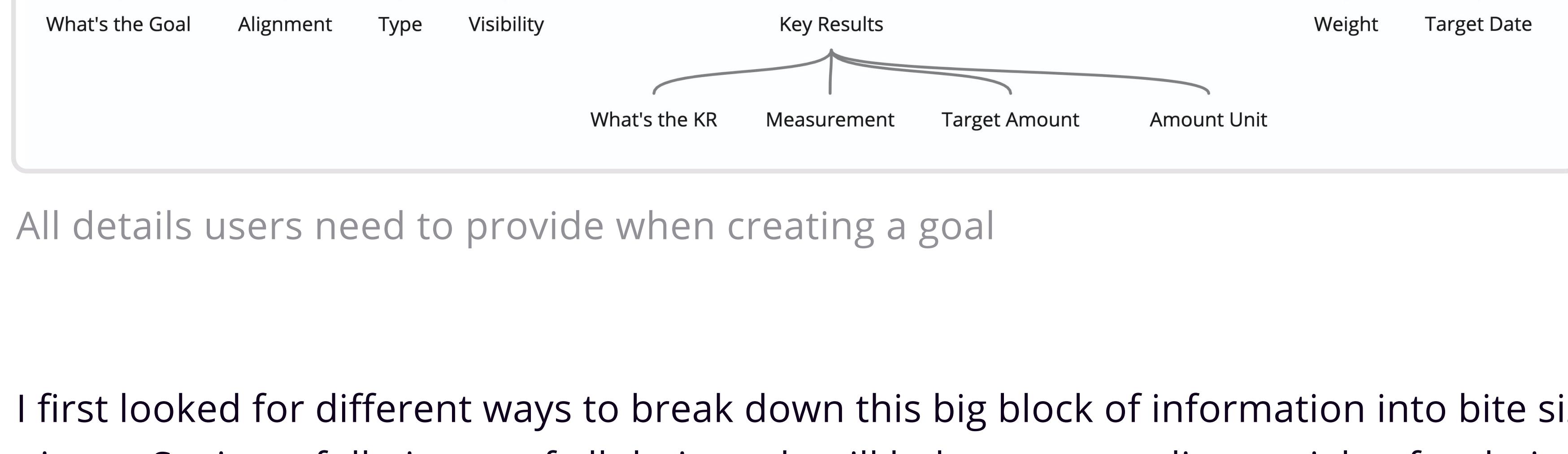
This is what I've tried and I shared with the larger design team. So other designers can refer to my timeline and iterate this process in the future

3 WEEKS	4 WEEKS	5 WEEKS	3 WEEKS	1 WEEK
<b>Ideal Design</b>	<b>Testing</b>	<b>Design Iteration</b>	<b>Testing</b>	<b>Final Design</b>
Think for long term and ideal experience	Validate use cases and assumptions	Balance constraints & ideal design Collaborate w/ design system designers	Validate UX compromises and iterations	Pixel perfect Dev ready

## DESIGN CHALLENGES

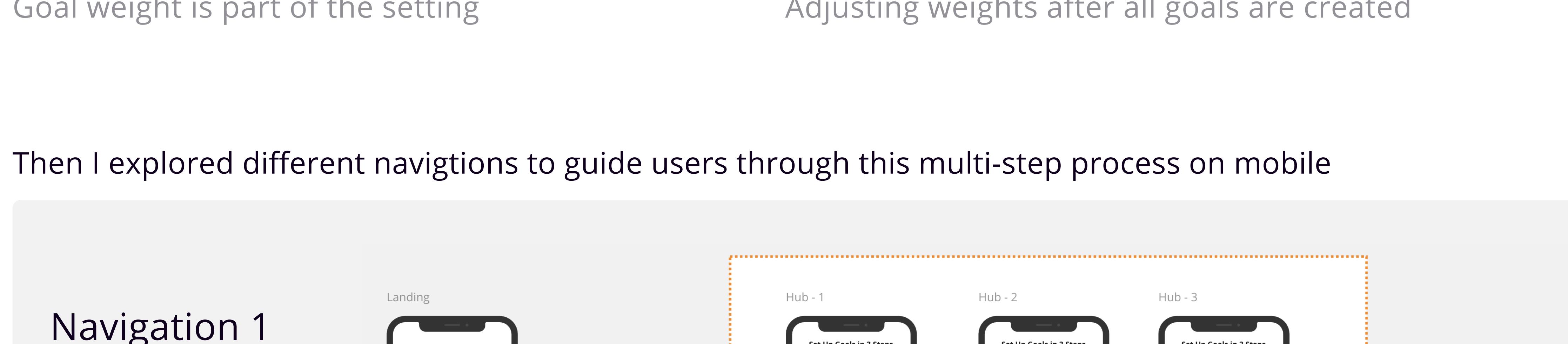
# #1. Navigate users through the multi-step process

Employees usually create 4 to 7 goals each year and need to set up many details for each of their goals.



All details users need to provide when creating a goal

I first looked for different ways to break down this big block of information into bite size pieces. Seeing a full picture of all their goals will help users to adjust weights for their goal with less cognitive load. Therefore Flow #2 is a better solution.



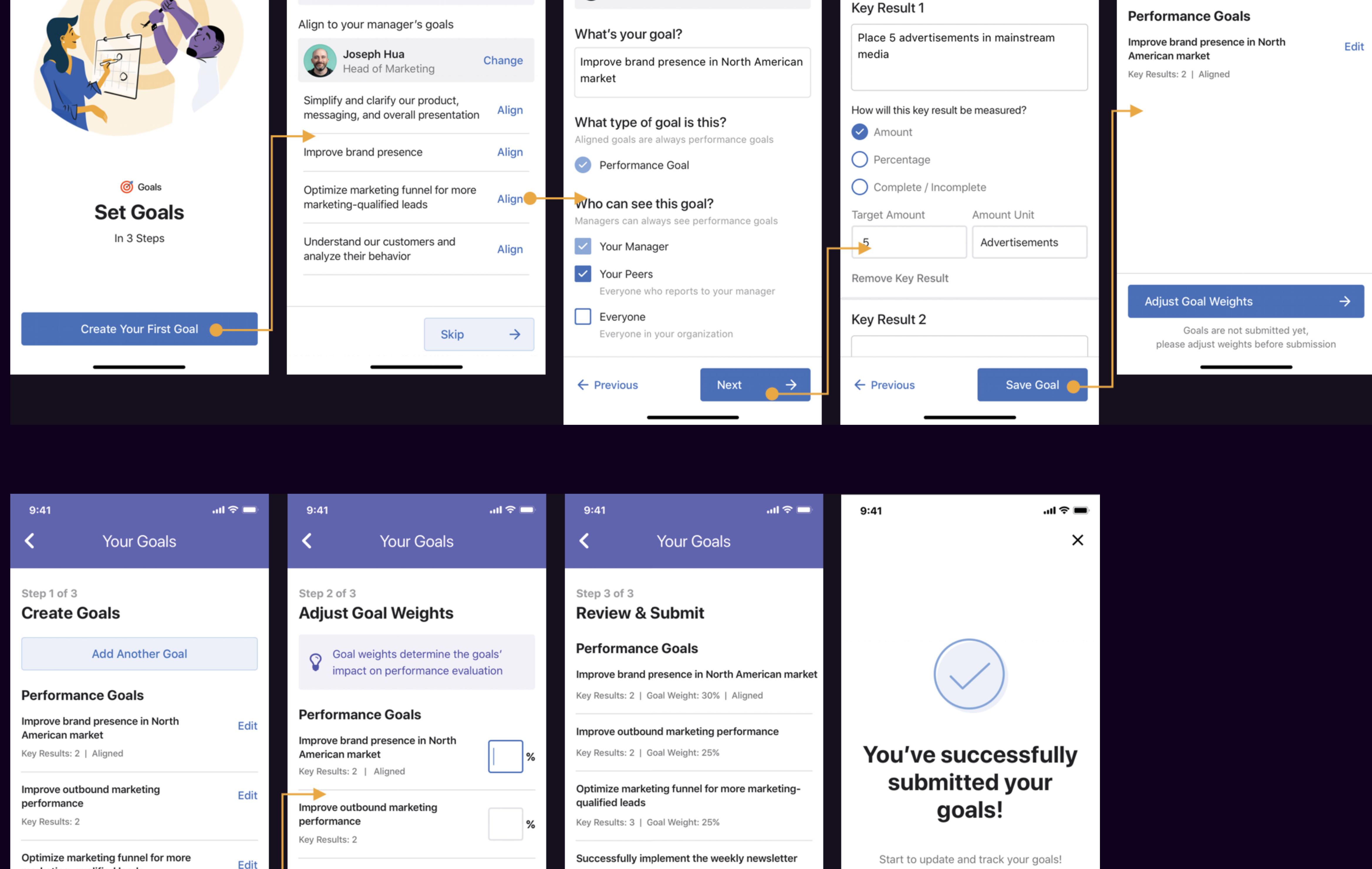
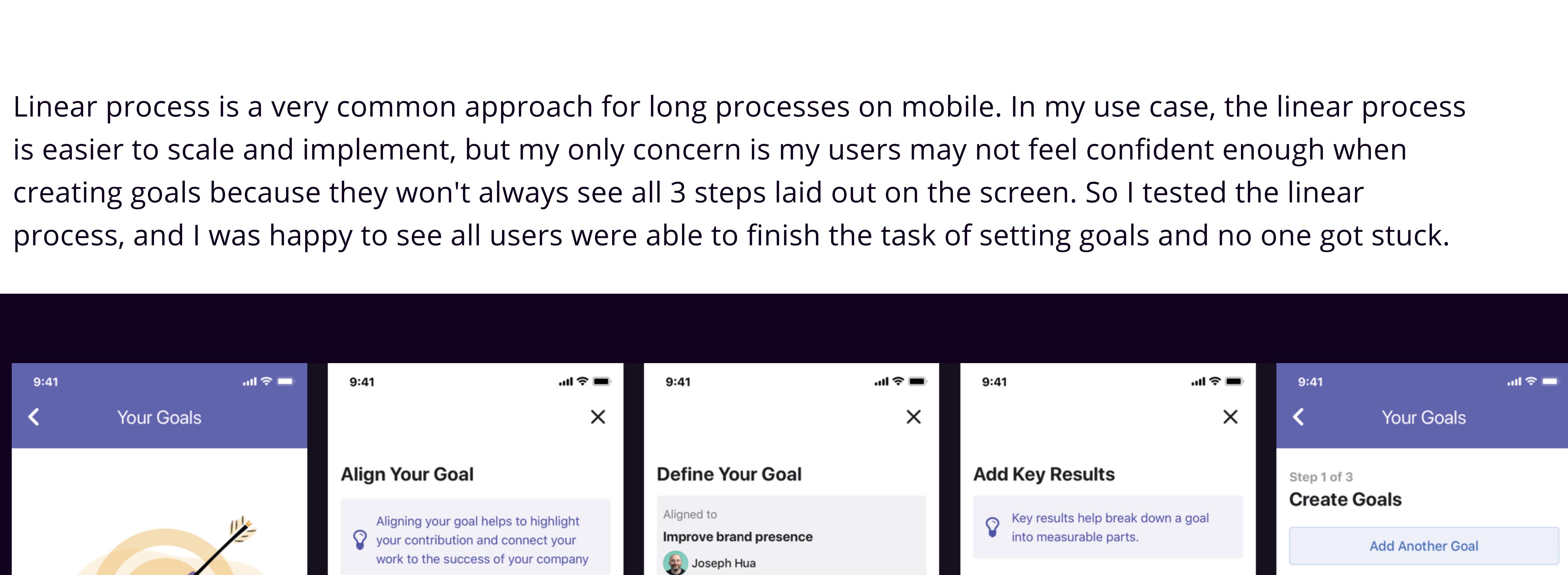
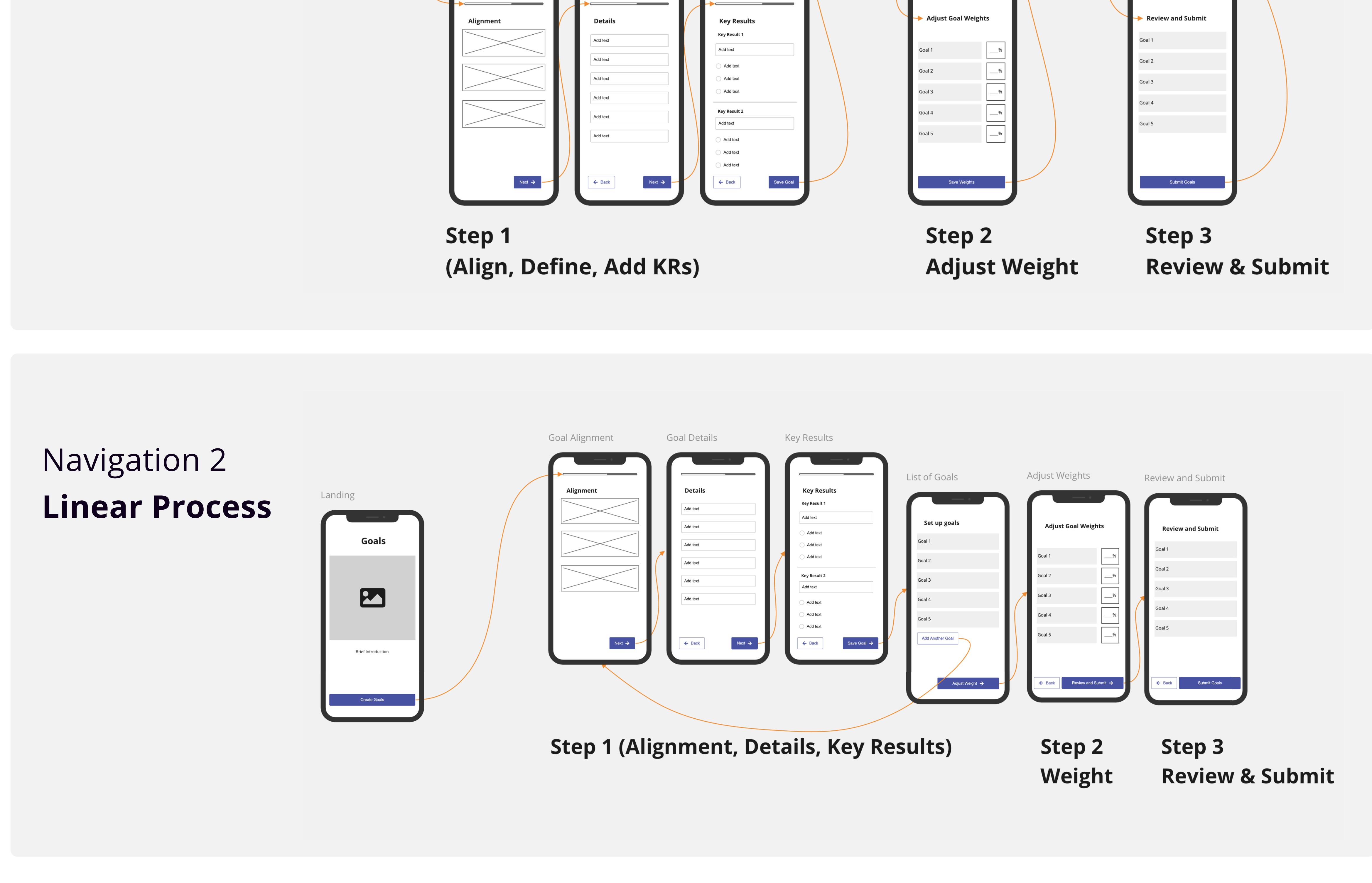
Flow #1

Goal weight is part of the setting

Flow #2

Adjusting weights after all goals are created

Then I explored different navigations to guide users through this multi-step process on mobile



## DESIGN CHALLENGES

# #2. Educate users about new concepts

During the first round of testing, I noticed that users got stuck when they ran into new concepts. So I sprinkled purple tips through the process of setting goals to introduce new concepts.

The image displays four mobile screenshots illustrating the design evolution of a goal-setting application, comparing an initial design with a final design.

**Initial Design:** This section shows the first three steps of the goal creation process:

- Step 1: Create a Goal**: A progress bar at the top indicates Step 1 of 3. Below it, a question "Would you like to align to another goal?" is followed by a list of five items, each with an "Align" button. The items are:
  - Improve UX maturity across "Next Gen products"
  - Build and launch the oneUX program
  - Scale Lifion platform to create consumer grade experiences
  - Build a research practice that helps product, design and development build the right thing
- Step 2: Align Your Goal**: This screen provides information on alignment and lists several goals for alignment, each with an "Align" button. The goals include:
  - Align to your manager's goals (Joseph Hua, Head of Marketing)
  - 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 behavior
- Step 3: Your Goals**: This screen shows the user's current goals. It includes:
  - A title "Step 2 of 3 Adjust Goal Weights" with a note: "Goal weights determine the goals' impact on performance evaluation".
  - A "Performance Goals" section with two items:
    - Improve brand presence in North American market (Key Results: 2 | Aligned)
    - Improve outbound marketing performance (Key Results: 2)
  - A numeric keypad for entering goal weights (1-9, ., 0, backspace).

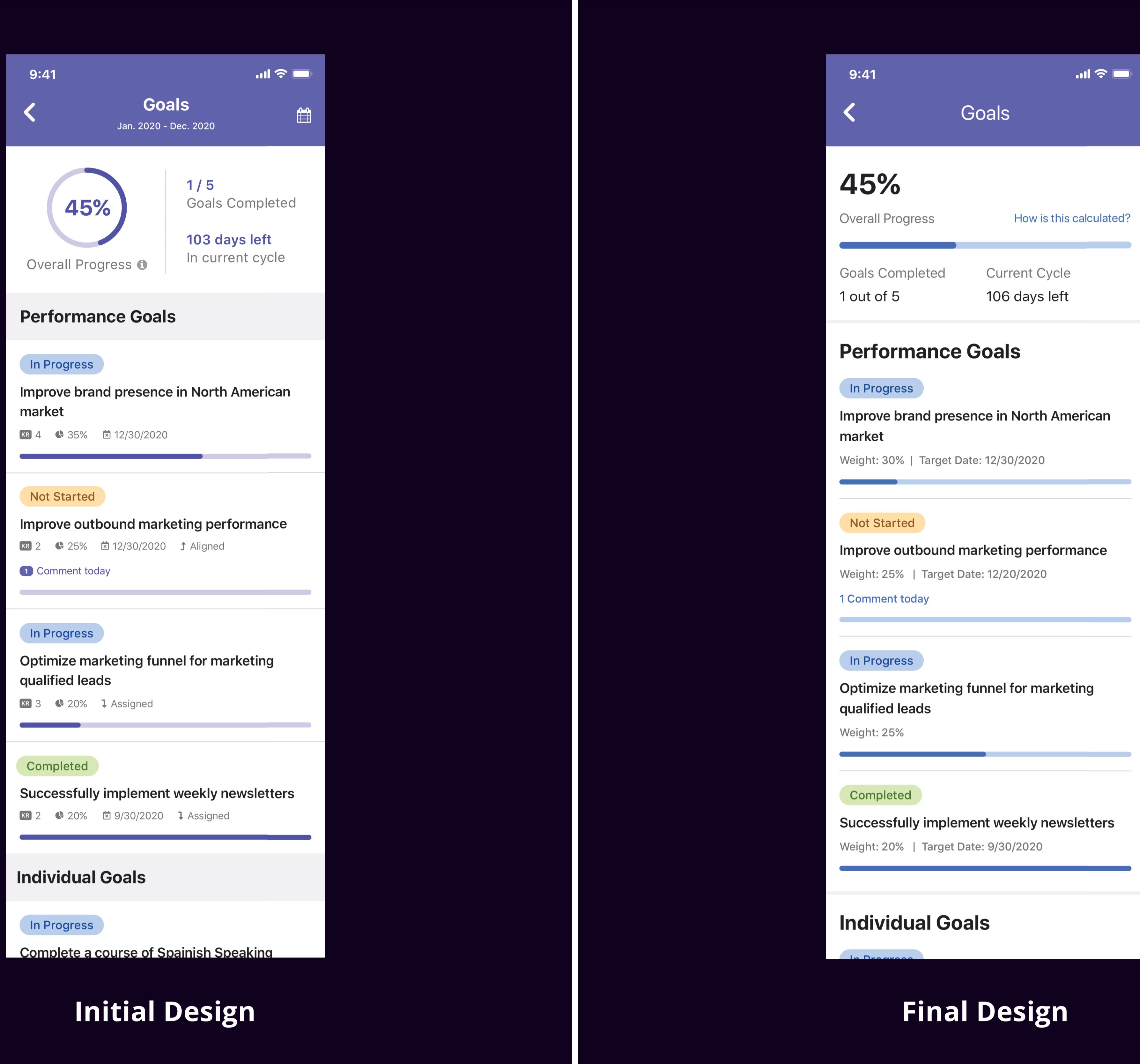
**Final Design:** This section shows the final step of the goal creation process:

- Add Key Results**: This screen adds a key result for the "Improve brand presence in North American market" goal. It includes:
  - An info card: "Key results help break down a goal into measurable parts."
  - A "Key Result 1" entry field containing "Place 5 advertisements in mainstream media".
  - Measurement options: "Amount" (checked), "Percentage", and "Complete / Incomplete".
  - Target amount: "5" and unit: "Advertisements".
  - Buttons for "Save Goal" and "Remove Key Result".

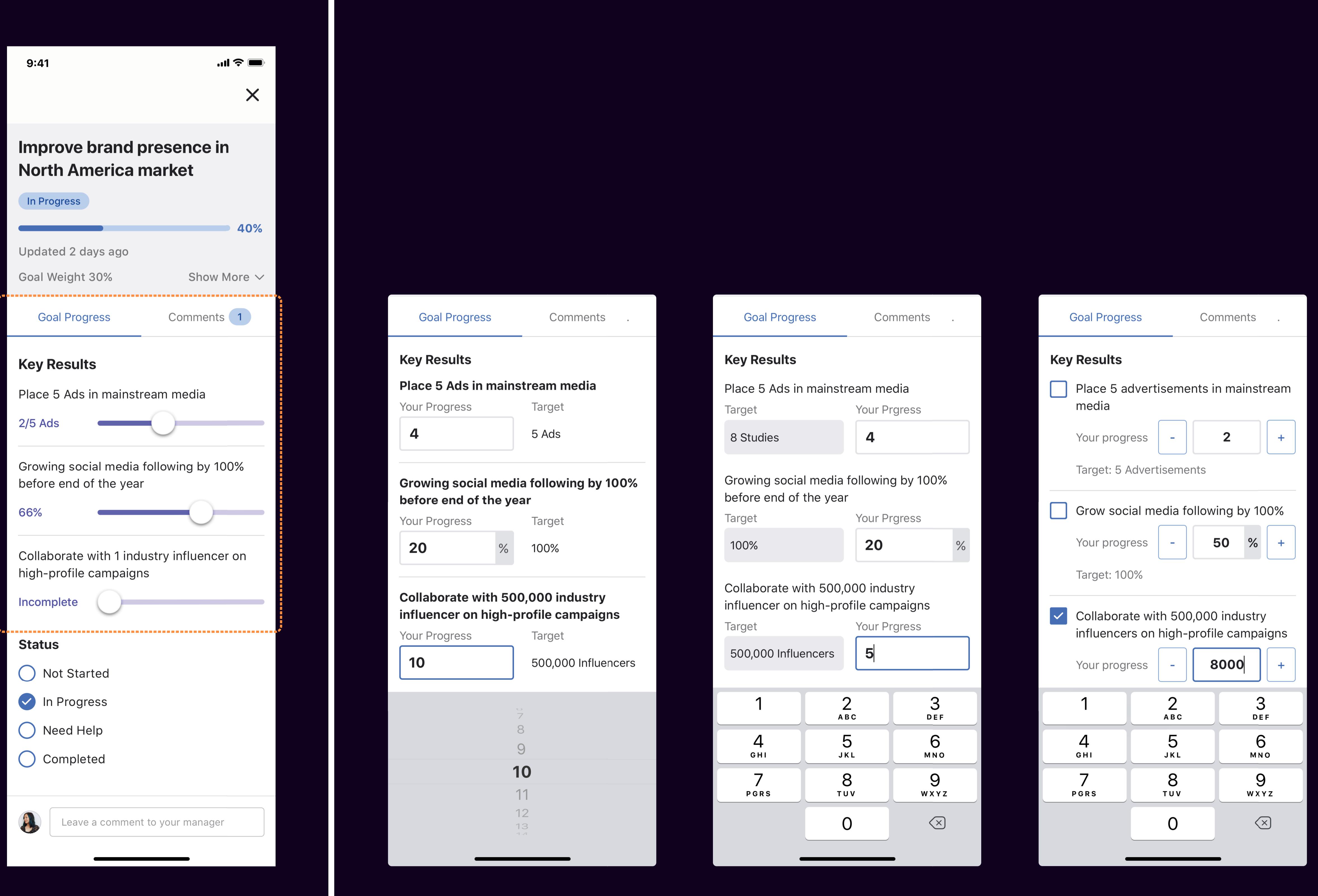
## DESIGN CHALLENGES

### #3. Balance constraints and good user experience

When I cannot have all components that I needed (e.g. circle progress bar, card layout, colored text), I used the basic components we have to build visual hierarchy and make sure it's still easy for users to consume all the information on the screen.

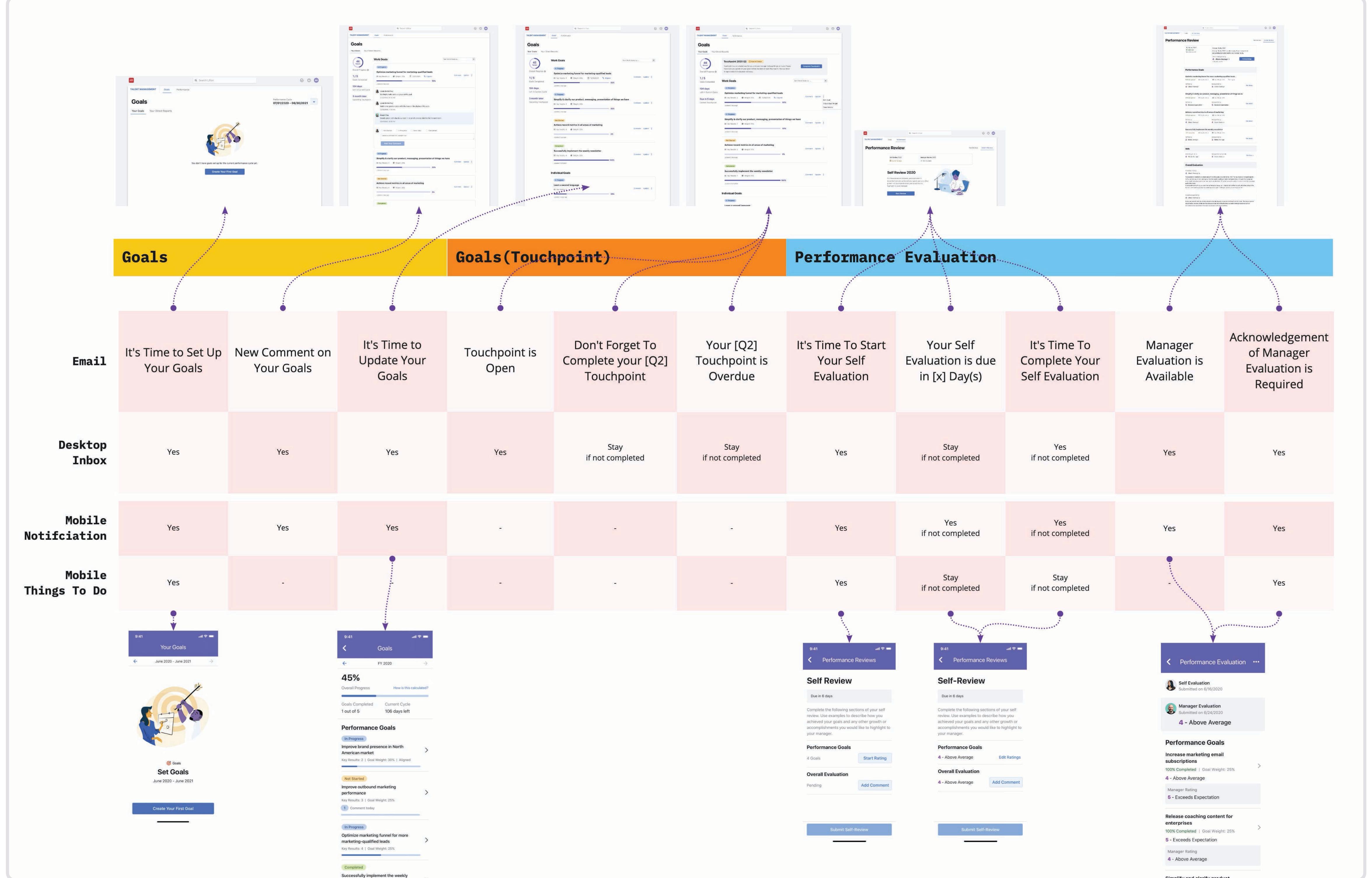


After communicating with engineers and design system designers, I understood a slider is too expensive to build. So I explored different solutions to help users more easily and quickly update their key results, no matter if they wanted to change KR progress dramatically (from 1 to 10,000) or incrementally.



## #4. Design a holistic experience

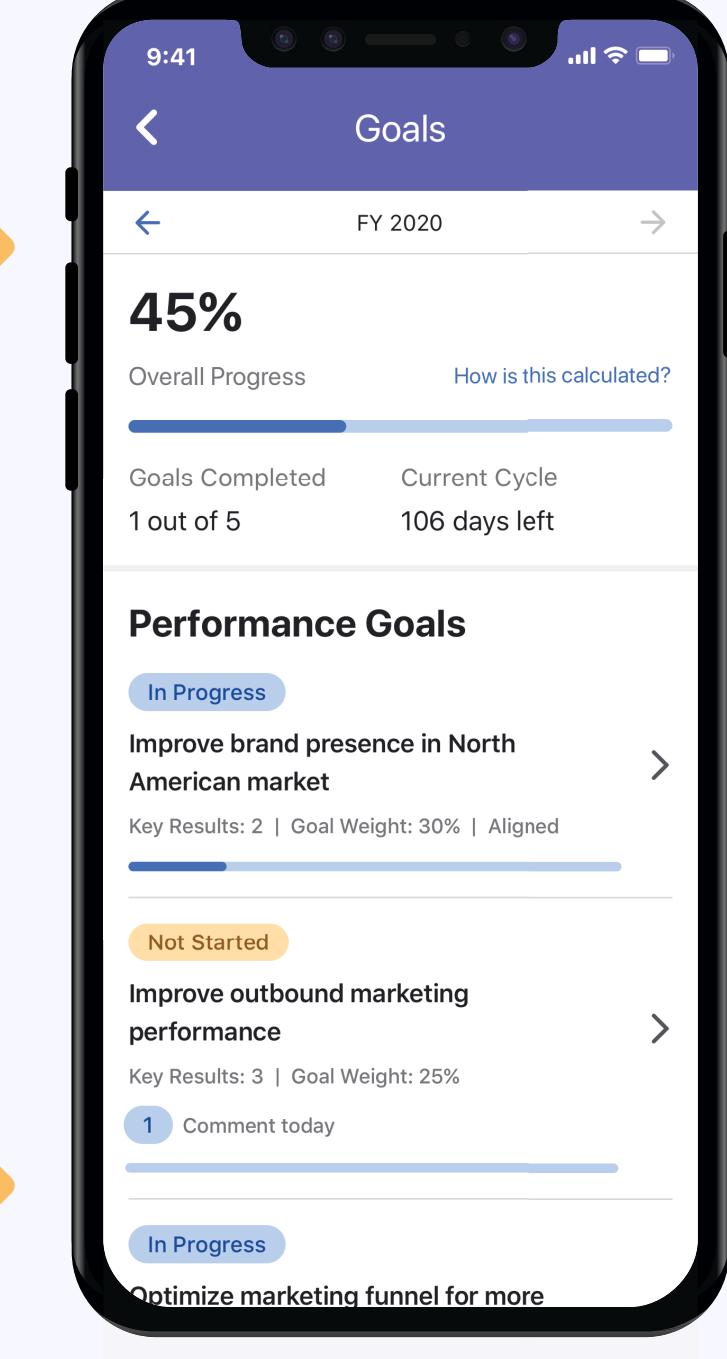
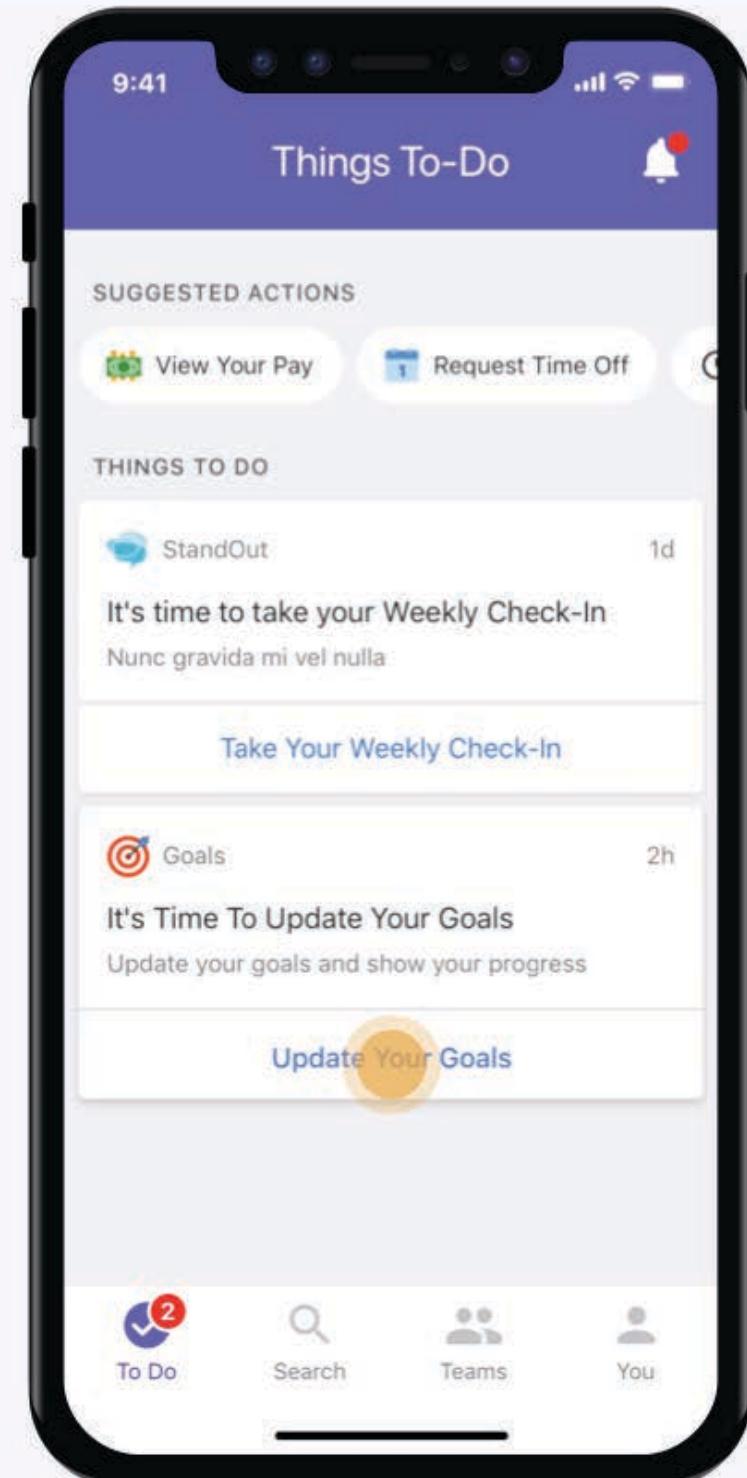
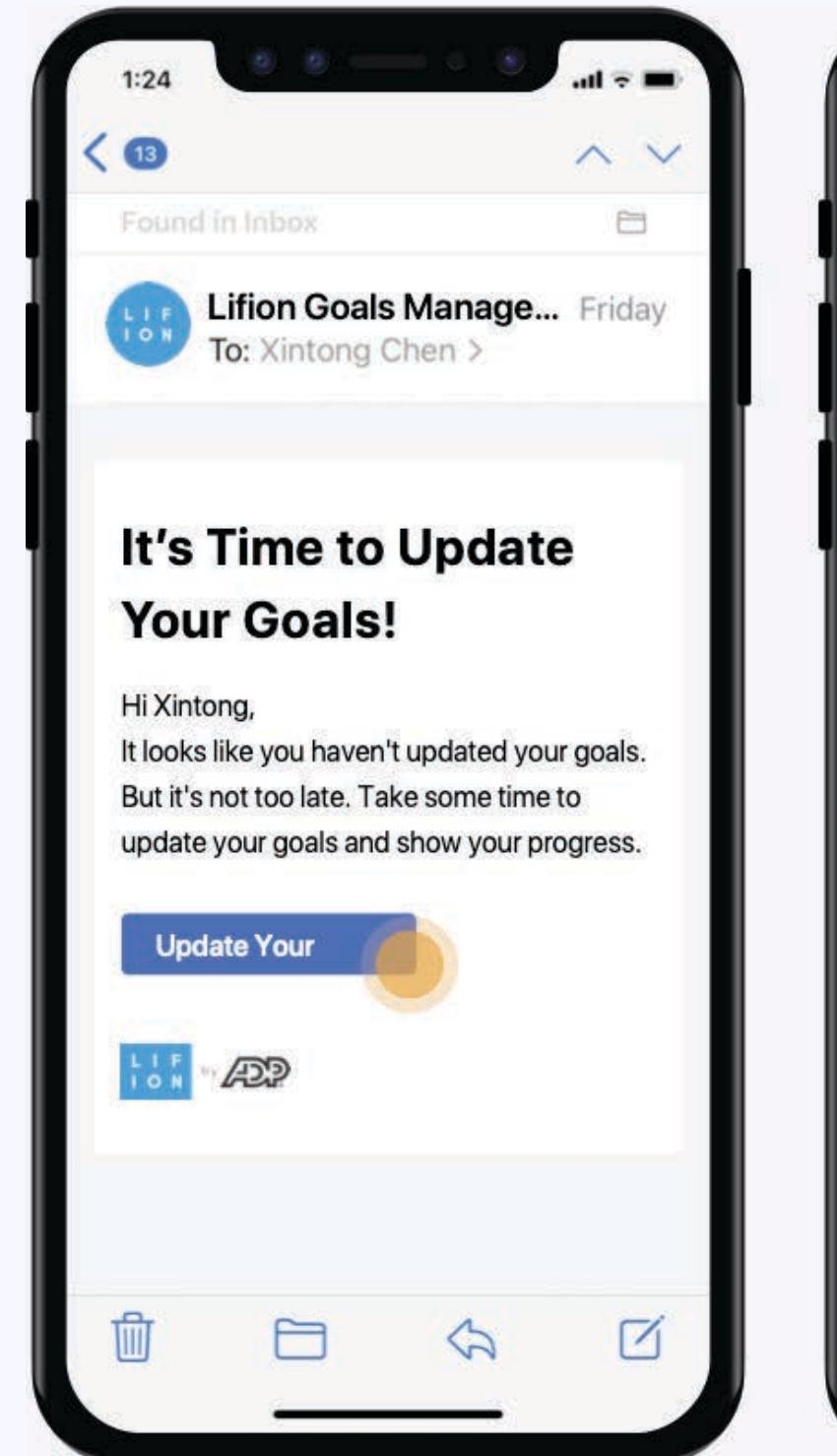
Goals Management is just one of many apps in our HR ecosystem. It's important to consider the holistic experience, especially what brings users to Goals Management.



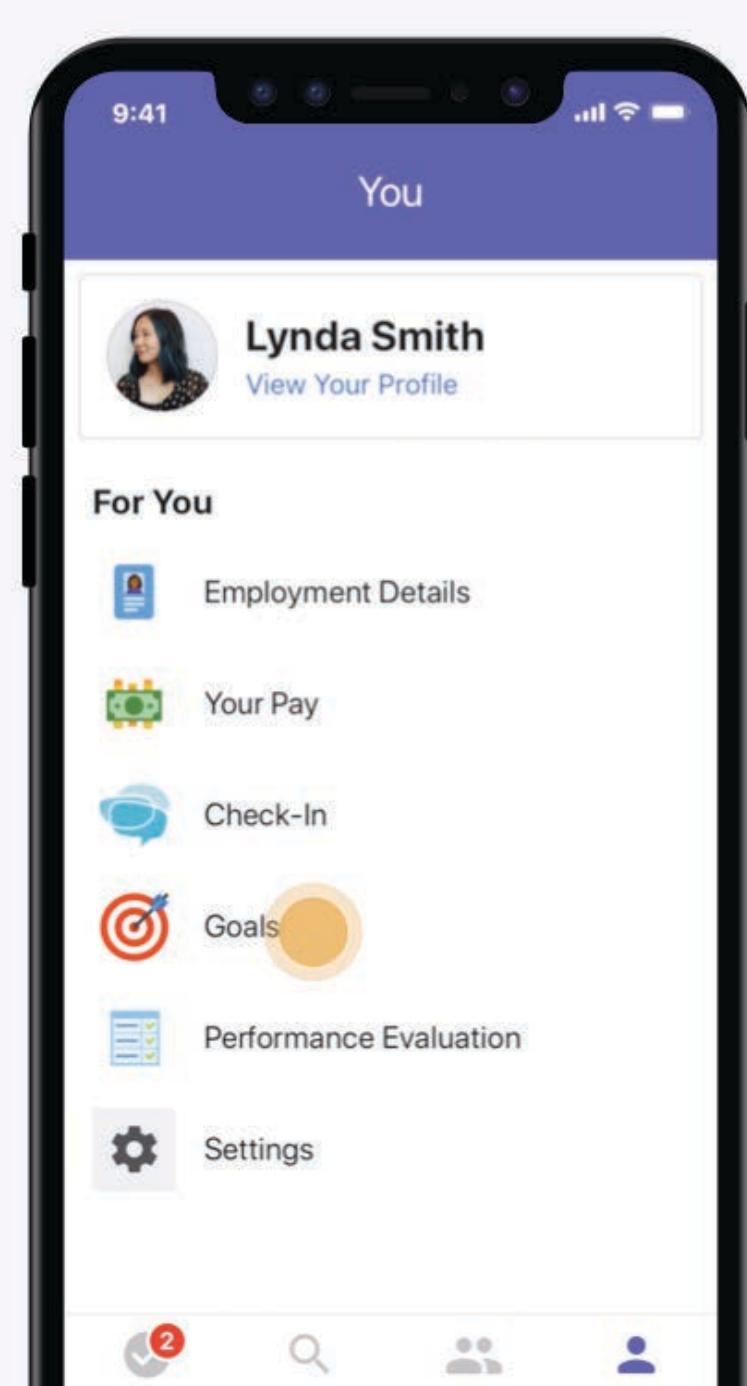
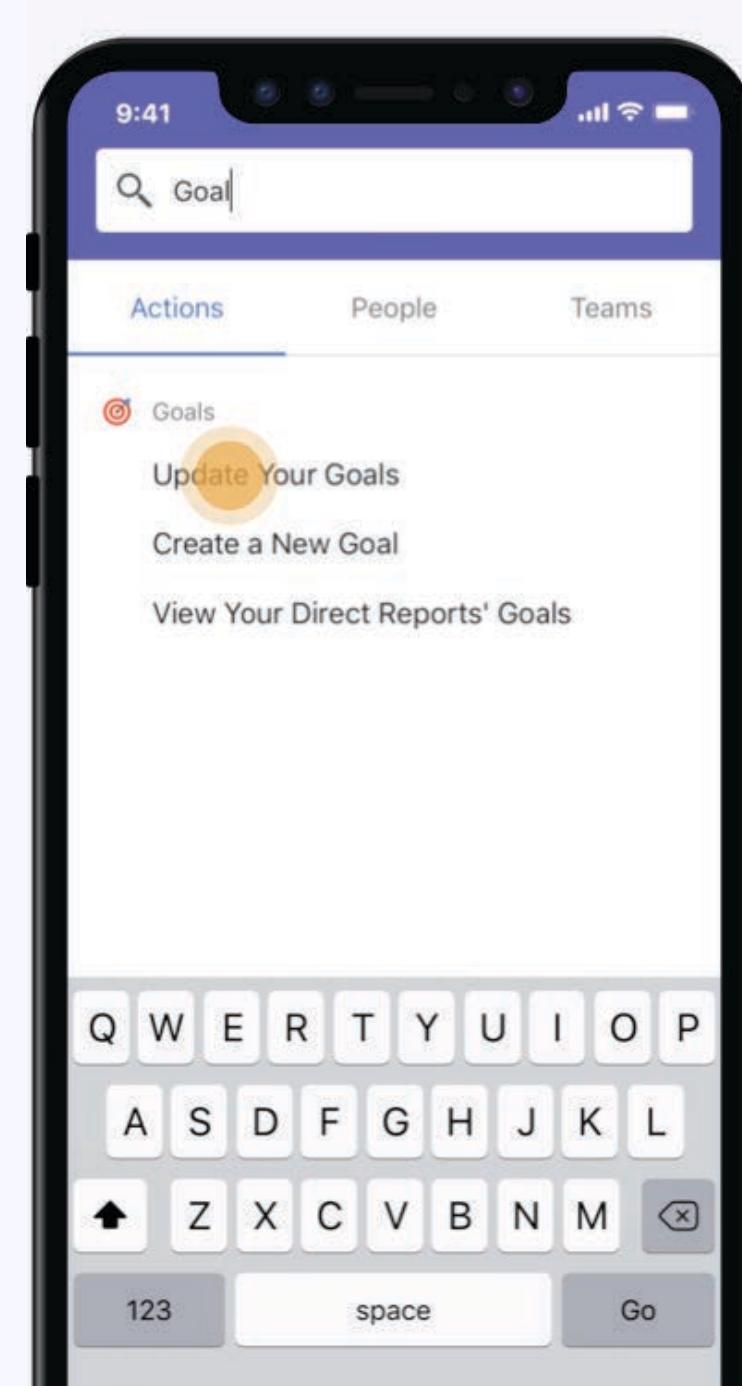
I defined all the moments when users will get a notification. When an action is required from the notification, I also mapped out the next step in the experience

For example, unmotivated users may rely on notifications to remind them to update goals. While motivated users could take the initiative to search for Goals Management app to update their goals.

Unmotivated Users  
(email or Things-To-Do)



Motivated Users  
(Search or Profile Page)



## DESIGN SUCCESS

### Ease of Use

I thought this system was easy to use  
1 (Strongly disagree) ~ 5 (Strongly agree)

FIRST TESTING

**4.21**

SECOND TESTING

**4.38**

### User Confidence

I felt very confident using this system  
1 (Strongly disagree) ~ 5 (Strongly agree)

FIRST TESTING

**4.03**

SECOND TESTING

**4.38**

## DESKTOP DESIGN

### Employee Experience - Set and Track Goals

The first screenshot shows the 'Align Your Goal' step of a three-step wizard. It asks users to align their goals with their manager's. The second screenshot shows the 'Set Up Your Goals' page where users can define performance goals with weights. The third screenshot shows the 'Performance Goals' section of the main dashboard, listing various goals with progress bars and due dates.

### Manager Experience - View Direct Reports' Goals

The left screenshot shows the 'Your Direct Reports' section of the manager's dashboard, displaying touchpoints for each report. The right screenshot shows a detailed view of Lynda Smith's goals, including her overall progress, completed goals, and a list of her direct reports with their own goal summaries.

### HR Practitioner Experience - Set Organizational Goals, Configuration

The left screenshot shows the 'Goal Library' where users can search and filter through existing goals. The right screenshot shows the 'Goals Configuration' section, which allows users to set up recurring touchpoints, schedules, and reminders for specific goals.

## DEVELOPMENT & LAUNCH

Launched desktop V1 in 10/2020

Building & aiming to launch mobile V1 in 3/2021

## NEXT STEPS

Kick off V2 features to make Lifion Goals Management more robust

# Thank You :)

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

<http://xintongchen.github.io>