




CONCEPT & STRATEGY DESIGN

# Talent Manager Experience

Unification of the talent suite of UKG products to provide managers a holistic landing experience, consistent navigation, and integrated tools

## A BRIEF PROJECT OVERVIEW

Company	
Timeline	September - November 2020
Team	2 Designers, 1 Business Analyst, 1 UX Researcher, 1 Engineer
Deliverables	<b><i>Low-fidelity concept designs</i></b> illustrating our proposed strategy for a unified navigation, consistent page patterns, and integrated tool functionality
My role	Ideation & evaluation for strategies of navigation & consistent page patterns

## **THE CHALLENGE**

### **To create a unified talent experience for managers.**

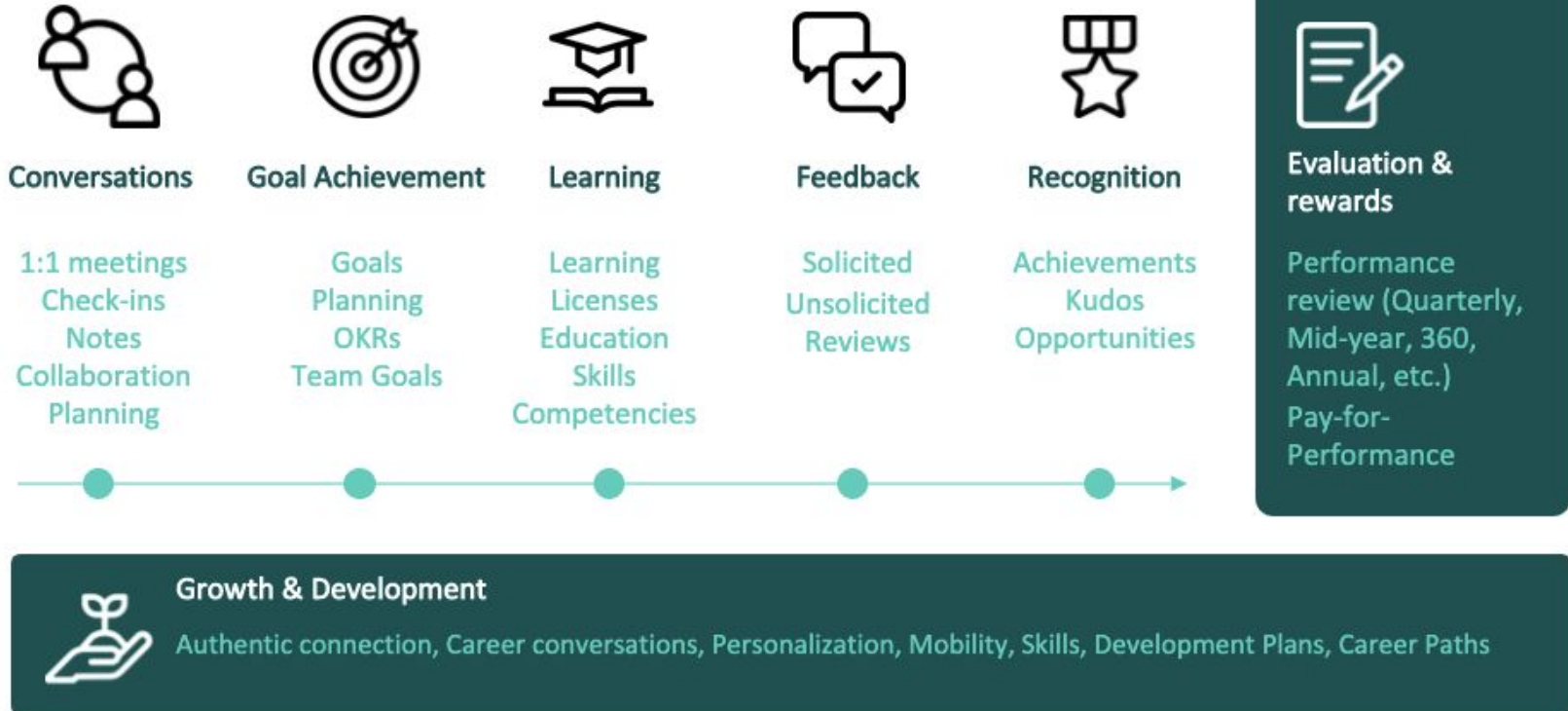
The goal here is to reduce the overall administrative burden of HR processes that managers have to deal with. Instead, managers can focus on transformational leadership by supporting their team, helping their employees grow, and getting real work done.

#### **Early research showed...**

1. A majority of existing customers don't access the current "talent dashboard"
2. A majority of customers are unaware they have access to use certain tools such as "Leadership Actions"
3. New talent products felt disjointed from legacy talent products
4. "Products don't talk to one another" - a commonly cited reason for low attach rates from customers

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## **THE BUSINESS OBJECTIVE**

### **To drive higher rates of adoption of our talent suite of tools & minimize implementation costs**

1. Replace an outdated, legacy “Manager Dashboard” experience
2. Unify our new talent tools with our legacy tools into one cohesive space
3. Create a flexible and customizable experience for customers who only buy a select number of talent products
4. Identify common patterns & scalable systems that can be reused for future implementation



**Employees quit because of bad managers, not because of their job ...**



## **WHAT WE KNOW OF OUR TARGET USERS**

### **Managers with a focus on knowledge-based team work**

1. Have a lot on their plate from day-to-day work on top of the challenge of coaching and leading teams
2. May not have had training or guidance on how to use existing tools for effective adoption & use
3. Want easy access to analytics, insights, and details about their team members to drill into
4. Information and work is spread out across different productivity tools that don't talk to each other

## BREAKING DOWN THE 12 WEEK PROCESS

### Discovery (3 weeks)

Audit of legacy products

User interviews  
w/ 9 external  
managers & 3  
customers

### Ideation (3 weeks)

Affinity clusters

Experience maps

Rapid brainstorming  
& design principles

Low-fidelity concept  
sketches

Storyboards &  
Prototypes

### Evaluation (3 weeks)

Concept evaluation  
studies with  
6 external managers  
& 2 customers

### Deliverables (3 weeks)

Core page types

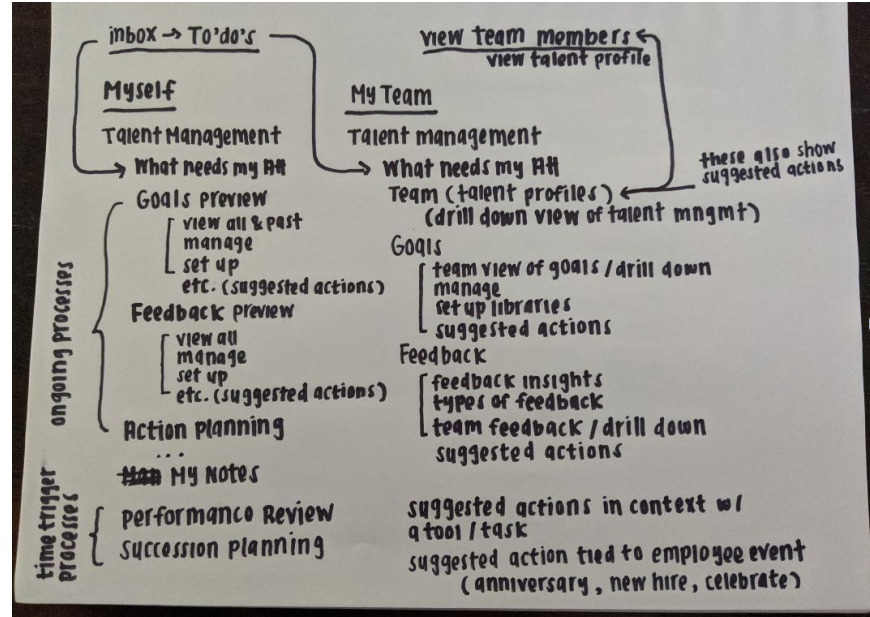
IA diagram

Tool integration  
mental model

## DISCOVERY - AUDIT OF LEGACY PRODUCTS

We learned that the hierarchical treatment of talent products in the main navigation was disjointed and confusing

- Existing manager experience navigation is separated into two types of activities: overview & administration
  - Administration items are not frequently used, yet they take up space in the main navigation
  - Overview items which are in high-demand for, are hidden away into multiple tabs
- New talent products are sitting on a different hierarchical level from legacy talent products
- Manager talent tools are named differently from employee talent tools







**The people beneath you  
should ultimately be prepared  
and trained to replace you ...**



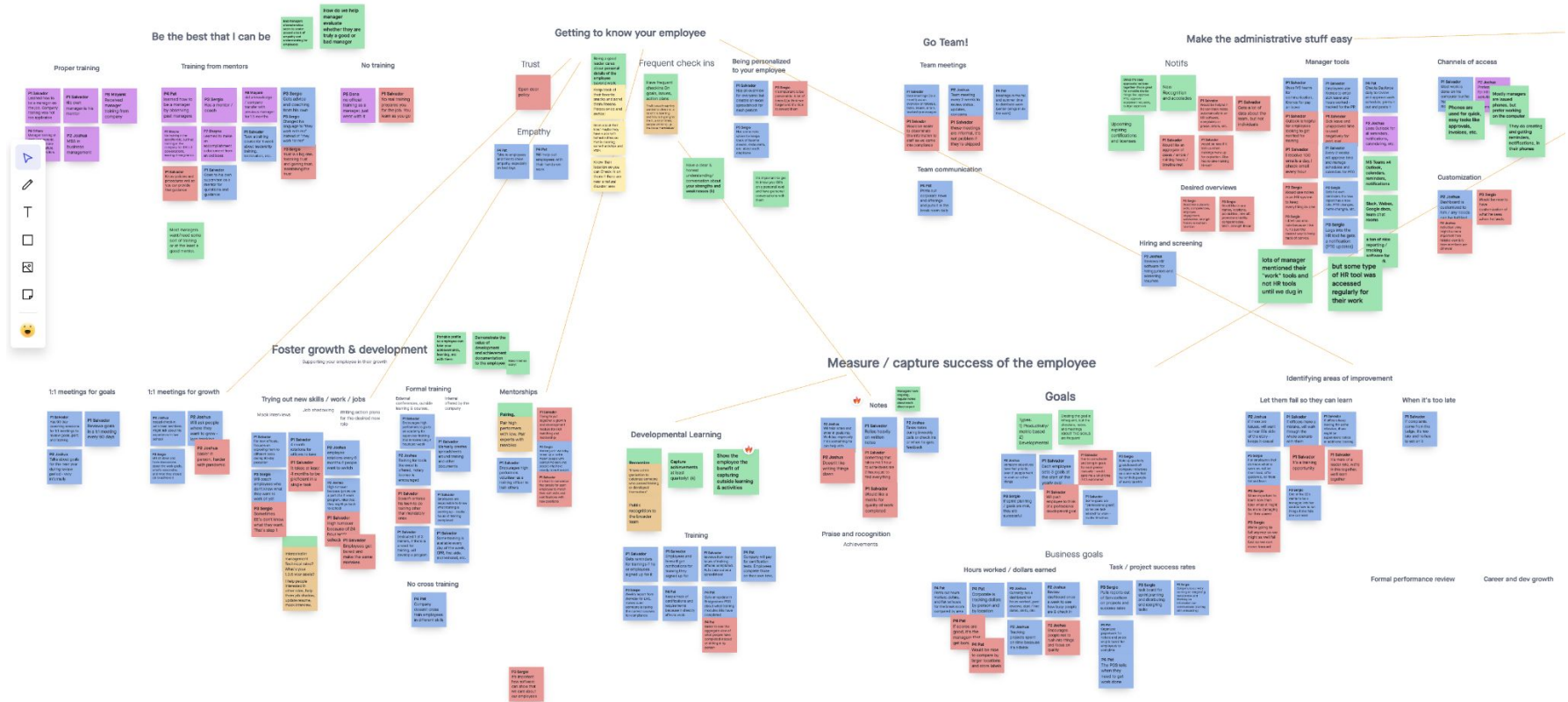
## **DISCOVERY - USER INTERVIEWS**

**We interviewed 9 external managers and 3 HR customers to learn that there is an underlying desire to focus on employee growth and development - but HR does not come to mind immediately**

1. Managers described logging into their HR system to perform transactional tasks like approvals. Performance & career related tasks were done regularly on a cadence but not always entered into a system
2. Managers frequently have personal notes on employee growth, development, and feedback in external tools outside of their HR system
3. For an ideal team overview, managers wanted to see competencies, promotability, company opportunities, career goals, employee's growth opportunities, job history, personality-type information, etc.

# IDEATION - AFFINITY CLUSTERING

We clustered our research data to uncover key themes around growth & development



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We clustered our research data to uncover key themes around growth & development



**Foster growth & development**



**Build authentic connection**



**Lead the team to success**



**Simplify the evaluation process**



- Be the best that I can be
- Get to know my employees
- Foster growth & development
- Measure & capture the success of my employee
- Go team - help my team succeed
- Make the administrative stuff easy
- Remove obstacles and manage daily life
- Supervise productivity and a service-focused team

After prioritization exercises w/ our stakeholders we refined our problem space around these 4 principles

## IDEATION - EXPERIENCE MAPS

We mapped out the experience for each core principle to better understand the manager activities and tools involved

“Simplify the evaluation process - consolidation stage” was our stakeholders’ most highly voted focus area to prioritize on

Stages part 1	1. Setting expectations & objectives	2. Capturing records	3. Solicitation	4. Consolidation
<b>Actions &amp; activities (from research)</b>	Setting employee goals • Reference company goals • Task completion rates • Criteria set by company or manager • Productivity metrics • Identifying criteria for excelling to next stage	Documentation of hard work • Recognition • Kudos • Customer feedback • Update & record activities towards goal progress • Company metrics • Hours worked • Tasks • Completed training courses	Peer feedback • Customer feedback surveys • Self review • Asking mentors for feedback • Asking mentees for feedback	Gathering data from various tools (1-1 meeting notes, reports, metrics, quantitative goals, qualitative goals, action plans, achievements, feedback, kudos from coworkers, certifications and licenses, customer feedback)
<b>Existing offerings</b>	Required performance / team goals Individual EE goals Goal planning Competencies	Notes, 1:1 meeting notes Review team goals / individual goal progress Review training Review EE profile	Feedback requests from peers, mentors, project leads, and sharing with direct reports. Performance reviews	1-1 meetings Goal / competency notes Goal management Feedback
<b>Opportunities</b>	Integrations w/ 3rd party productivity tools (e.g. integration with Slack or Service Now, Jira, to track tickets & bring into Review)	Connect all of these tools to performance reviews	Ability to solicit feedback on a goal or competency and then view that feedback from the performance review	Repository of employee's relevant documentation all in one place, filterable by time frame. Performance dashboards, leader scores

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Stages part 2	5. Assessment activity	6. Delivery	7. Positive / negative consequences
<b>Actions &amp; activities (from research)</b>	Assess individual skills and competencies • assessment of performance on goals • summarization • looking at all the data of the employee • did these EEs get work done on time? • did they meet success criteria • stack ranking	Performance conversations in a 1:1 meeting • Acknowledgement phase • Officially submitting to employee records	Reward / recognition • Salary increase • Gifts / prize / monetary increase • special perks • extra vacation • promotion  PIP • Demotion • Disciplinary action • Getting fired / terminated
<b>Existing offerings</b>	Review individual “Talent factors” Feedback Goal / competency assessment Reviews & Performance ratings	Performance management 1:1 meetings	Manager notifications / suggested tasks Learning (completion / course certification) Feedback - positive / negative Reviews
<b>Opportunities</b>	Skills / trends change over time	Offer templates or guided conversation for growth & development	Connect performance reviews to incentive software

THE CYCLE REPEATS ITSELF



## IDEATION - RAPID BRAINSTORMING & DESIGN PRINCIPLES

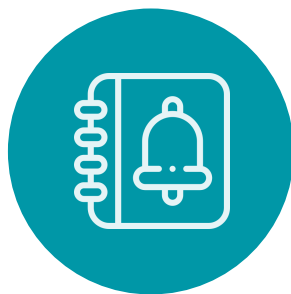
We came up with 100+ unique ideas using a creative matrix exercise and distilled those back down into 5 design principles to convey through our concepts



**Guided, scheduled, &  
actionable tasks**



**Interplay,  
integration,  
& easy  
documentation**



**Contextual support &  
prompts**



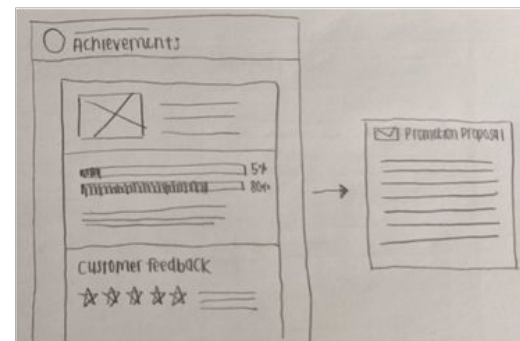
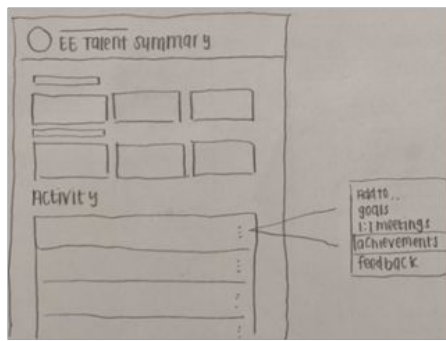
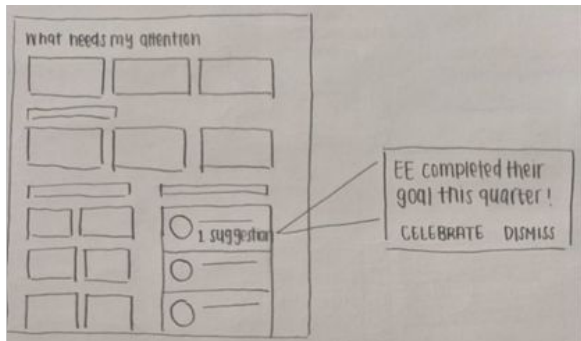
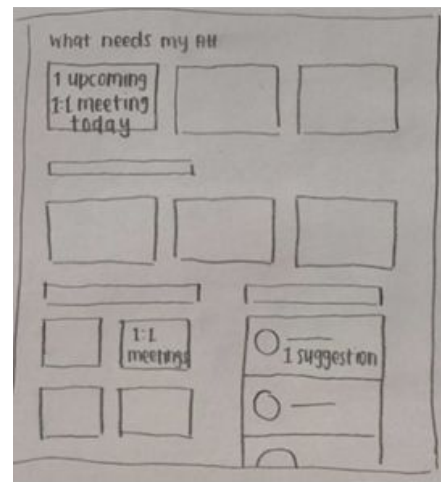
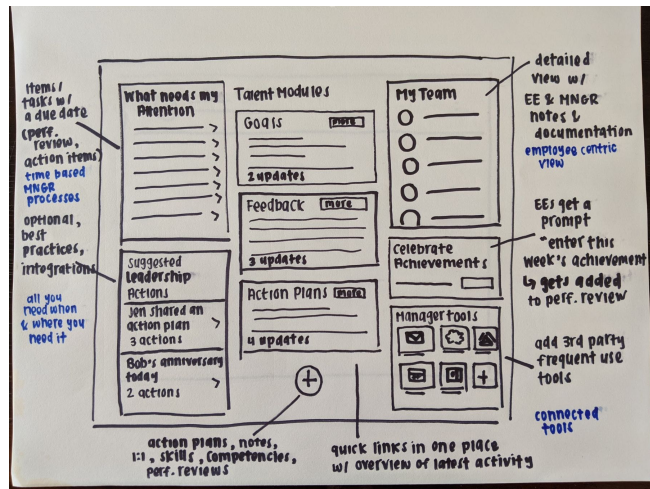
**Celebrate  
recognition &  
achievements**



**Customization &  
personalization**

## IDEATION - LOW FIDELITY CONCEPT SKETCHES

We sketched out holistic  
“hub” experiences using  
our design principles &  
brainstorm ideas as  
inspiration & guidance



## IDEATION - STORYBOARDS & PROTOTYPES

We used storyboards to prototype the interplay of talent tools integrating with different manager activities. We solicited feedback from stakeholders & users on the flow.



**Alex**

A leader looking to coach  
their 6 direct reports



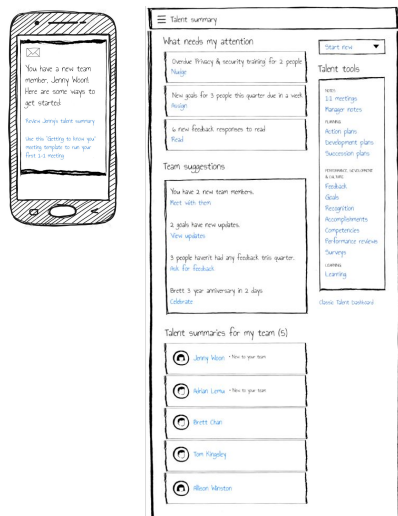
**Jenny**

A software engineer who may be  
looking to transition into product

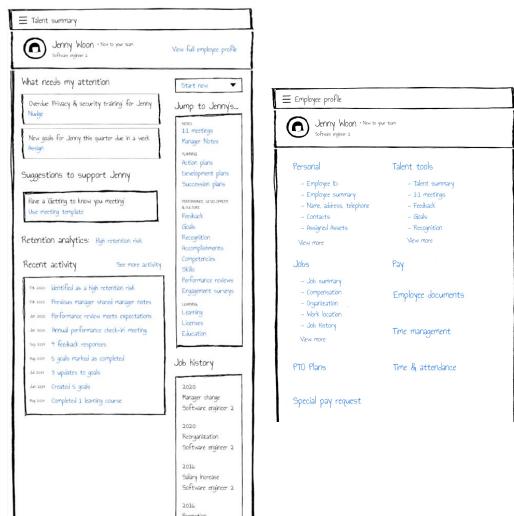


# IDEATION - STORYBOARDS & PROTOTYPES

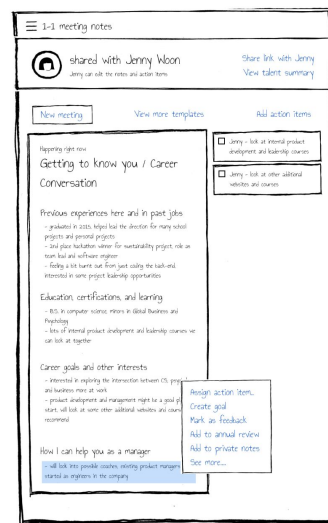
We used storyboards to prototype the interplay of talent tools integrating with different manager activities. We solicited feedback from stakeholders & users on the flow.



Alex gets a some suggestions on how to learn more about his new team member Jenny



Alex has access to all of Jenny talent details & her personal profile - he sees she hasn't been promoted in awhile



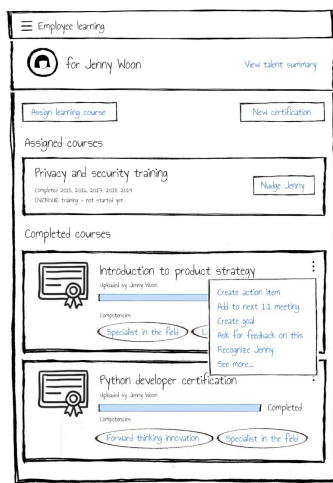
Alex sets up a 1:1 meeting using a template and creates some action items to help support Jenny

# IDEATION - STORYBOARDS & PROTOTYPES

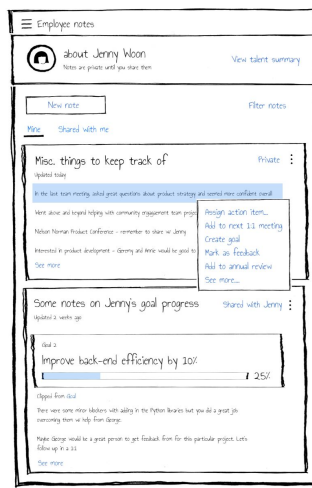
We used storyboards to prototype the interplay of talent tools integrating with different manager activities. We solicited feedback from stakeholders & users on the flow.



Alex collaborates with Jenny on her development plan goals through comments



Jenny completes a learning course and Alex marks it as an achievement



Alex makes notes on Jenny's progress with private notes



Alex has access to all this information for the annual performance review



**We have a lot of incomplete tools and this feels like a complete tool ...**



**All of this takes a lot of stress off the manager so that the scramble at the end of the year to put the whole review together would be a lot easier ...**

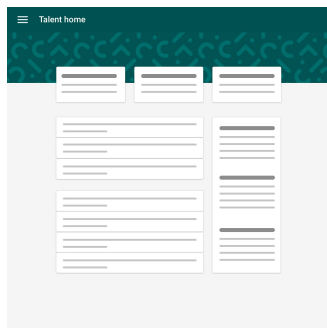
## **EVALUATION - CONCEPT EVALUATION STUDIES**

**We ran studies with 6 external managers and 2 HR customers to test 3 key concepts: landing hubs, wayfinding, integrated tools and data transfer**

1. Most managers felt they could get to anything they wanted to in Talent and that “everything I need is here”. Access to a full suite of talent tools in one place is a great idea
2. The ability to take a piece of content from one tool and copy / recreate it in another tool was a delighter
3. Participants mentioned this would set them up well for completing formal performance reviews b/c the documentation work would have been done throughout
4. The concept of sharing and collaboration was extremely valuable and offered flexibility. However, privacy controls would need to be considered and deliberate
5. These tools would need further integration with existing habits like calendar, Microsoft Teams, mobile, etc.

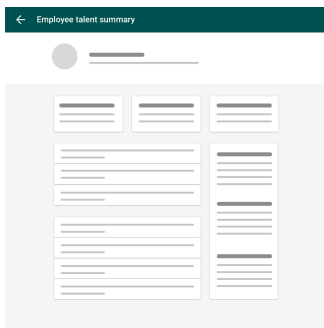
## DELIVERABLES - CORE PAGE TYPES

We simplified our design to 5 core page patterns as a system for all our products based on the positive feedback that validated our low-fidelity concepts



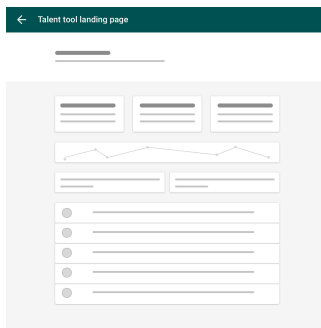
### Talent home

Main landing page for everything talent related about my team



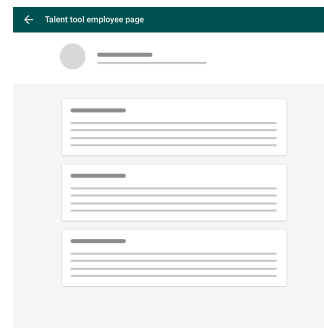
### Employee talent summary

Everything talent related about an employee



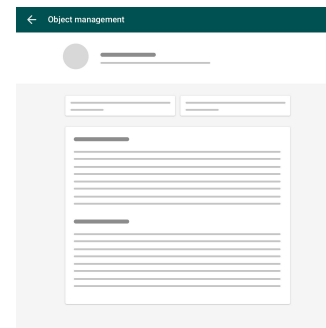
### Tool hub

Everything related to a specific talent area including access to all employees' individual histories



### Employee tool history

History of objects, activity, an analytics specific to an employee about a talent area

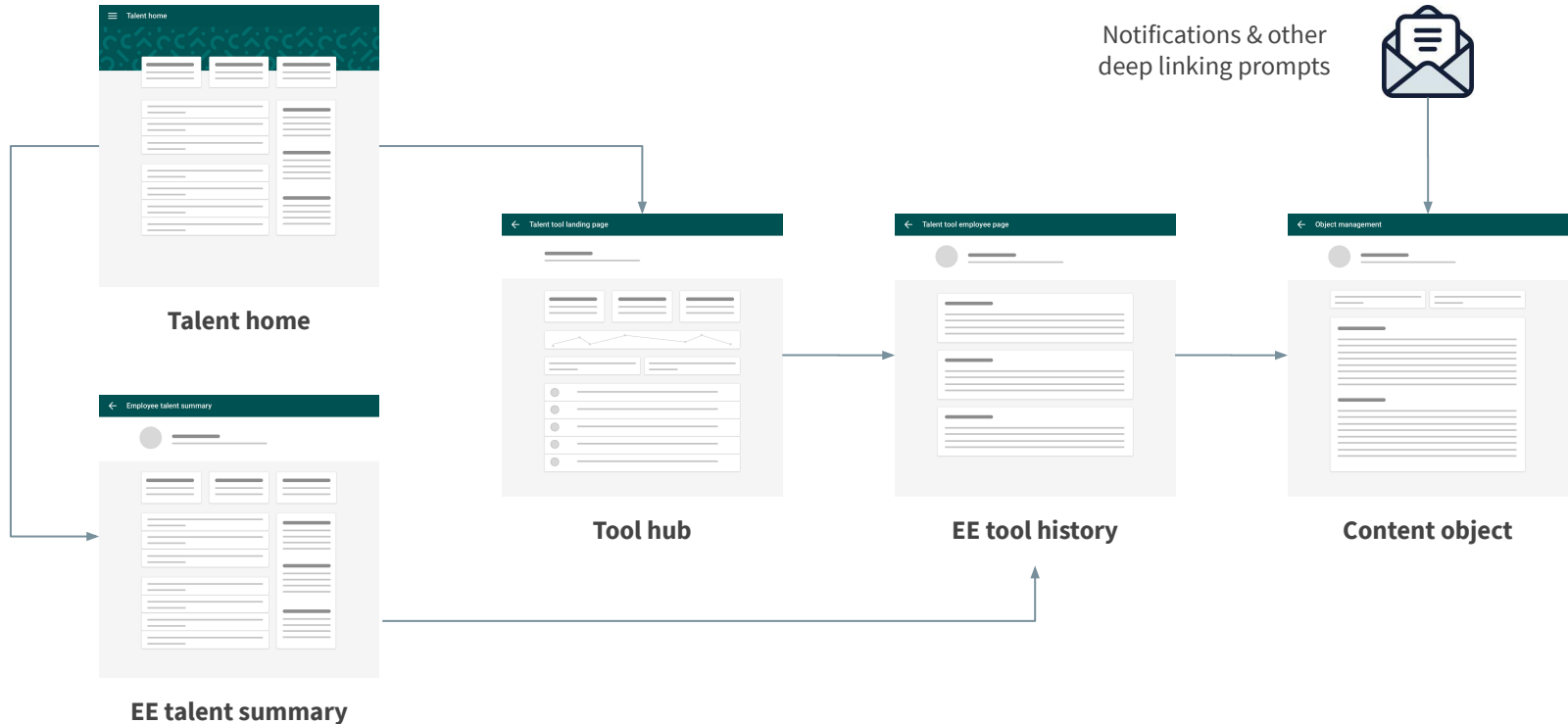


### Content object

Information created or collected from a talent area or process that can be shared, moved, etc.

## DELIVERABLES - IA DIAGRAM

An IA Diagram helped to communicate the strategy around the navigation

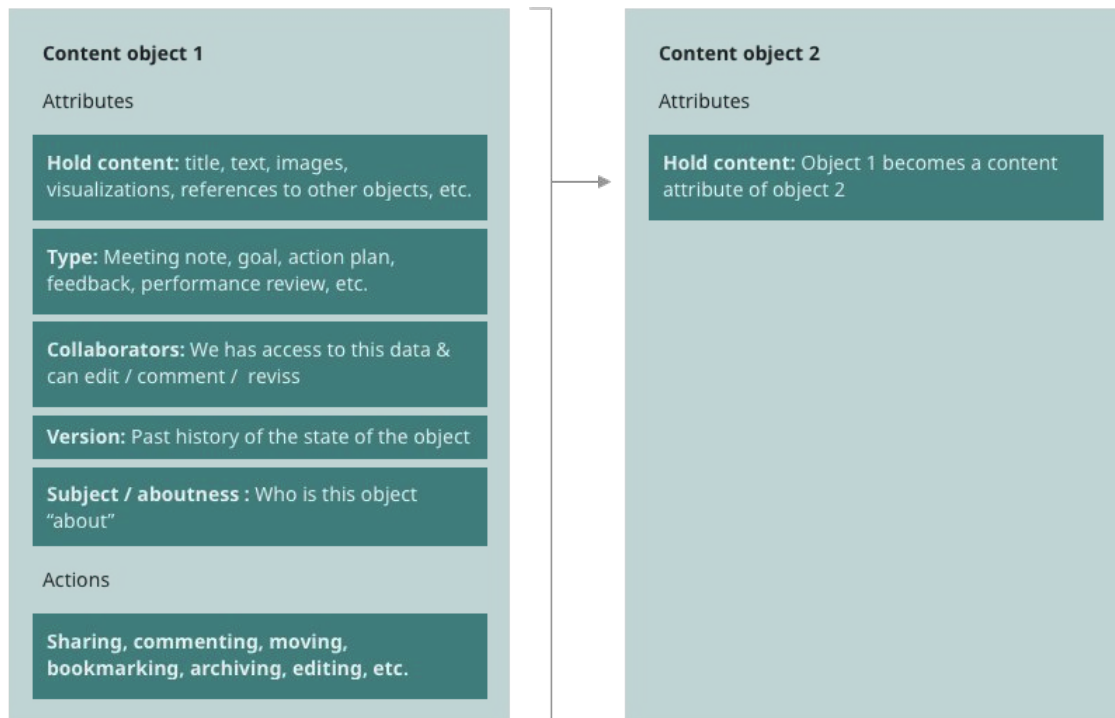


## DELIVERABLES - TOOL INTEGRATION MENTAL MODEL

An early-stage diagram of the content object helped to communicate the mental model around tool & data integration across different products

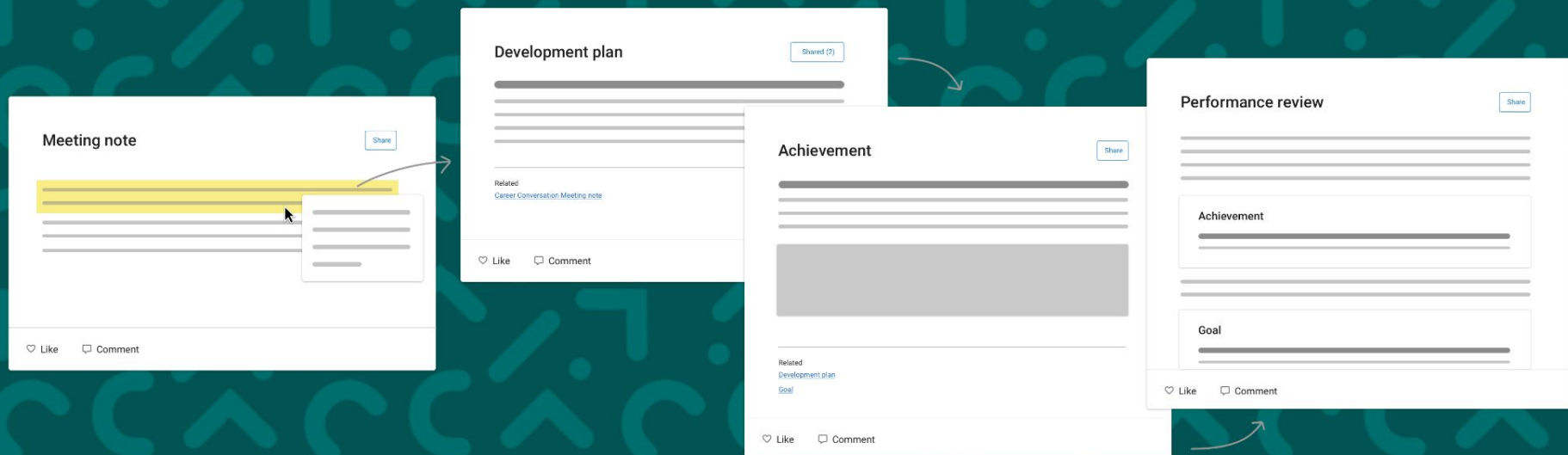
### Content objects

are created, managed, and moved around in tools. They have a set of attributes. There are a set of actions that can be performed on the object itself. Objects can form the content of new objects.



## DELIVERABLES - TOOL INTEGRATION MENTAL MODEL

An early-stage diagram of the content object helped to communicate the mental model around tool & data integration across different products



## THE IMPACT

**This project acquired funding for the holistic experience to be a framework for new talent products to include. It served as a strategy and starting point for future work.**

### For the business

- Launched several collaborative efforts for our team's work to be included into platform-level initiatives including unified navigation, hub page patterns, and an end-to-end journey
- Served as a guiding framework for 2 of our new products to integrate into
- First “team” type of manager experience initiative to be introduced and funded for the talent suite of products

### For live customers (TBD)

- Measure if customer attach rate for talent products is increased
- Measure if adoption of existing tools increase
- Evaluate if customer satisfaction has improved



## LOOKING BACK AT THE PROJECT



### What went well

Concepts were well received & tons of research validated the strategy to move forward

Helped the team take initiative to reduce siloed products

Created a system of patterns that can be scalable and reused for other products



### What could be better

The project was limited to talent products because that's our domain - we didn't get a chance to consider other HR tools that the company offers and work with those teams' needs and use cases given time & resources constraints. This means we risk having a big gap to fill later on.



### My key takeaways

Stakeholder representation from product owners is so valuable for providing direction & prioritization

First time thinking about systems and scalability. It was a fun challenge to work on broader strategy.

Thank you for your time ...  
**Any questions?**



## TEAM MEMBERS

Sr. UX Designer (consultant) - Anya Nikulina

Sr. UX Designer (lead designer) - Kate Barrett

Sr. Business Analyst - Christine Rector

Sr. User Researcher - Rebecca Tremaglio

Engineering Lead - Pedro Laucerica Rabelo

## & CREDITS

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