

Case study 2 - Apex wrapped

Challenge

Role: Driver, Owner & Product designer

Collaborators:

Skills

Zeynep

Visual Design

Andreea

Interaction Design

Jesse merhi

Engineer

Hamish

Timeline:

3 days

Post - SHIP IT

ENG spent - 9 months on it.

1 month - design spent on it.

Overview

Building a performance review tool to streamline internal processes and create efficiency for all Atlassians



Brainstorming in the Atlassian office

The current space

When I'm working at Atlassian... I noticed that whenever it becomes close to performance reviews all my peers finds it challenging to balance their work time while still making sure they complete their performance review.

This reduces productivity for all Atlassians, whether it's time spent working on important projects or reviewing all the work they've done the past quarter and writing up their self-assessment.

Some quotes from Atlassians

"Team the self assessment for the entire org is at 35% and today is the last day, As a team we have delivered a lot in the last 6 months, so please take few hours to capture everything that you have accomplished in your self assessment so we can have a productive APEX cycle."

"Manager time in performance review hasn't been reduced. Managers are actively moving dates forwards to their teams to allow adequate time to write performance notes. 1 week to write 14+ notes isn't possible without working late nights/weekend."

"Sorry, I'm focus on performance review"

"Here's the reality: 100% of my performance review is currently done on nights and weekends, because I have zero available time. I'm pretty sure critical projects is higher priority than performance review, so there's no pushing that work out."

There are no tools or process improvements that can help with the performance review process.

Who is this for?

To better understand Atlassians, I created a Questionnaire.

Narrowed down to two different types of users: individual contributors and managers. The questionnaire had 63 responses from various different Atlassians from different roles, levels and teams.

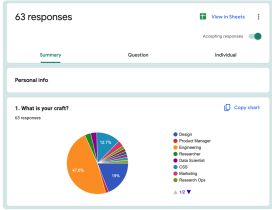
For the Questionnaire.

We had a couple of assumptions, such as

- Finding and collection information about what you're working on is challenging
- Writing up the self-assessment is challenging
- Not having enough time meeting up with manager
- Not knowing where to start, there's not enough guidance for APEX
- Impacting your current work in some ways
- Frequency of doing performance reviews
- The time you've taken for performance review
- Providing feedback

Below is the questionnaire summarized

Table of questionnaire	
Questions	Understanding
Personal information (63 participants)	
• Role	Participants
<div> <div> Different roles </div> <div> Design <ul style="list-style-type: none">• Product design• Design managers• Marketing </div> </div>	47.6% Engineering 19% Design 12.7% CSS (support engineer) 3.2% Researcher

Product Manager Engineering <ul style="list-style-type: none"> • Data scientist • CSS Research <ul style="list-style-type: none"> • Research Ops Support Finance <ul style="list-style-type: none"> • Revenue operations 	3.2% Data scientist 3.2% Marketing 1.6% Product manager 1.6% Research Ops 1.6% Program manager 1.6% People 1.6% Revenue operations 1.6% Support 1.6% Finance
<ul style="list-style-type: none">  	
<ul style="list-style-type: none"> • Individual contributor or Manager 	87.3% Individual contributor 12.7% Manager
<ul style="list-style-type: none"> • Team? 	
<ul style="list-style-type: none"> • Which level are you? 	9.5% P30 Junior - early career 20.6% P40 - Mid-level 31.7% P50 - Senior 23.8% P60 - Lead 3.2% P70 - Principle 1.6% P80 - Senior principle 1.6% P90 - Head of area
About the performance review process	
<ul style="list-style-type: none"> • What went well in the performance review process (why?) 	<ul style="list-style-type: none"> • Having tools like go/iris have links to everything • having a tool to complete performance review
<ul style="list-style-type: none"> • What did you find challenging about the performance review process (with assumptions above) (Also provide rating on how much it affects you) 	81% The time taken for performance review 66.7% Impacting your current work in some ways 61.9% Writing up self-assessment

	<p>58.7% Frequency of doing performance review</p> <p>46% Finding and collecting information about what I've worked on</p> <p>23.8% Not having enough time meeting up with manager</p> <p>19% Not knowing where to start, there's not enough guidance for performance reviews</p> <p>1.6% Not enough time to complete performance review</p> <p>1.6% collating peer feedback is challenging</p>
<ul style="list-style-type: none"> • Explain what is the process you go through when trying to do performance reviews. 	
<ul style="list-style-type: none"> • How long did you spend on [collecting all relevant resources/documentation] 	
<ul style="list-style-type: none"> • How long did you spend on [writing your self-assessment] during performance reviews. 	
<ul style="list-style-type: none"> • How long did you spend on [giving peer feedback] during performance reviews. 	
<ul style="list-style-type: none"> • What key pieces of information did you need to successfully write your Self-Assessment? (Business impact, customer impact, OKR impact, What did I accomplish in this project, how long I took to complete this project?, challenges I overcame) 	
<ul style="list-style-type: none"> • Did your manager help collaborate with you on performance review (which of the above did you appreciate more and how could you have felt more supported?) 	

- What would you wish you had for performance review? (having a tool to help collate information about all the work I've worked on, having more time to meet up with Manager talking about performance review, having more time to work on performance review, being able to edit your self-assessment throughout the cycle)

Results:

Both managers and individual contributors encountered the same struggles.

The root cause of this problem is the way that performance review system is setup but as I'm not working in the performance system team I couldn't address some of the problems mentioned such as (81% The time taken for performance review, 66.7% Impacting your current work in some ways, 58.7% Frequency of doing performance review, 23.8% Not having enough time meeting up with manager, 19% Not knowing where to start, there's not enough guidance for performance reviews, 1.6% Not enough time to complete performance review, 1.6% collating peer feedback is challenging).

The problems that I can address are thinking of ways to improve

61.9% Writing up self-assessment

46% Finding and collecting information about what I've worked on

So what ?

Atlassianians need a tool that integrates with different Atlassian apps. This tool can help them find and collect information about what they worked on and help write their self-assessment.

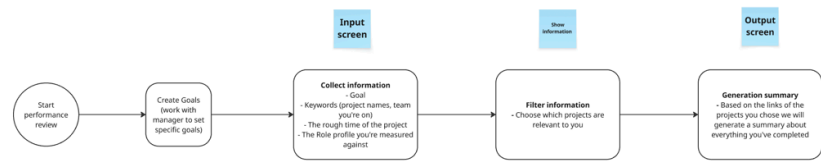
There were a couple of things we needed to consider, so we diagrammed the information we needed from the users and the final outcome they needed.



Rough diagrams on the performance review tool

There are some flaws that we realised once we communicated with the engineers, we couldn't decide on what information was relevant to show for the filtering system. These are purely based on the individual's discretion. We didn't have anything definite that could be used as a baseline rule for categorising the information either. There could be many different use cases where the individual wanted to find multiple projects at the same time or include a specific resource link that may be outlined as irrelevant to their project.

So we changed the design plan.



Updated diagram on the performance review tool

Taking this information, I then helped the team reimagine the design scope, which included 5 different areas.

1. Welcome screen	2. Input screen	3. Edit mode for projects	4. Edit how the information are structured	5. Final confluence page
	<ul style="list-style-type: none">• Project title• Need to input Goals• Short description - on the project• key words we want the system to search up	<ul style="list-style-type: none">• Function checkbox• Drag and drop to reorder the links• Order the links (whether it's confluence, jira , atlas)	<ul style="list-style-type: none">• Projects groups• Ability to put projects into goals• Links• Summary of the project information (if possible)	<ul style="list-style-type: none">• The entire output text formatted.• Output goals• groups:• Project impact• Direction• Craft excellence• Organizational impact• It should spit out relevant links under each

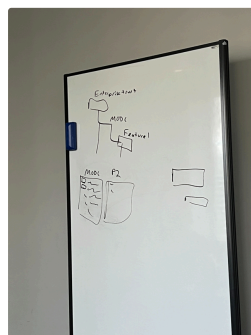
				Theme/Goal. • Summary of the links and how you've achieved your goal will come under that.
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Mock ups

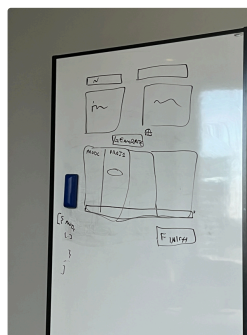
Together with the engineering team, we discussed the vision for the performance review tool in how it's potentially going to work.

We realized that the links that LLM have found would need to be grouped in a way Atlassians can choose which links are relevant.

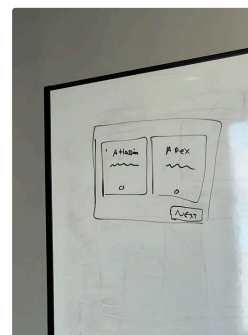
Intially similar to this Mock up the best version would require less user input and the LLM can read the pages on Confluence based on the grouping of the page we can then show them the relevancy.



Option to choose what information is most important



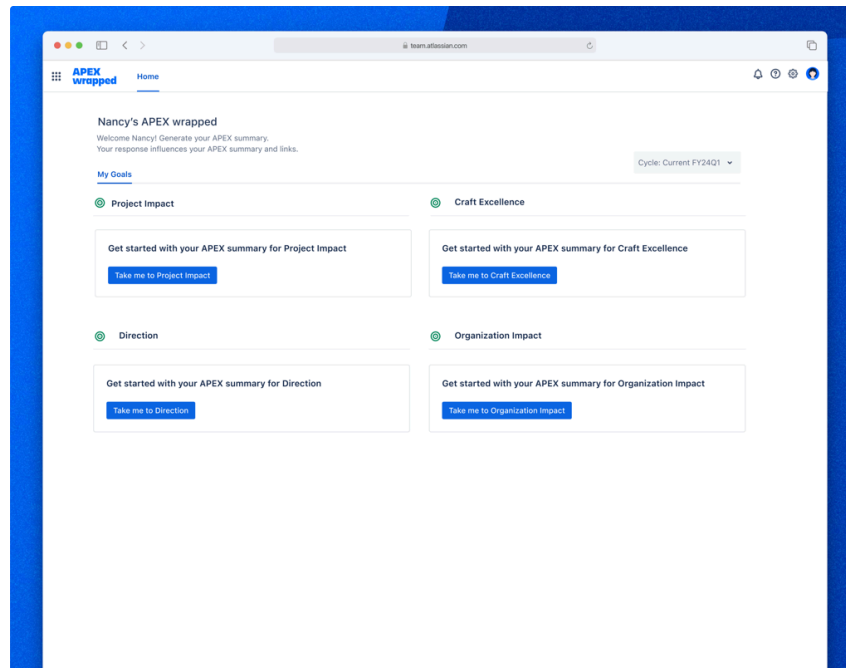
Ability to generate multiple project summaries



Review screen where you can view all your different performance review areas all at once

Design handover to engineers

Together all the designers worked on creating a home screen that would showcase all the different areas of the performance review where the user can compare the information side-by-side. Including additional other designs (which I can't show due to privacy reasons).



Design handoff home page

The official tool

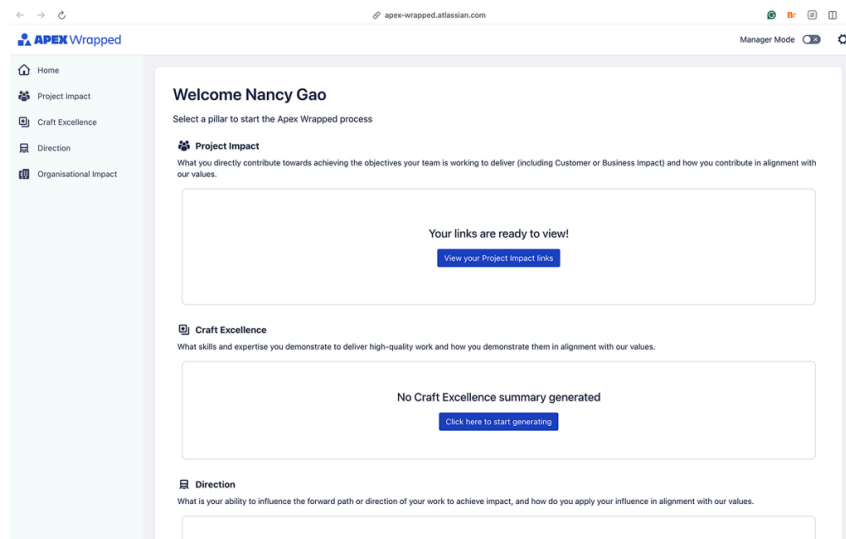
The engineers worked on the designs separately and implemented designs that were visually different from the Figma design handoff, as they struggled to build based on the designs we created as they weren't a part of any existing library.

Trade-offs

After evaluating on the length of time our engineers would need to make the visuals match our designs we created.

The focus shifted from having nice visuals and together we decided that the most important goal of this tool was to be fully functional rather than purely just looking nice.

So we let our engineers to hardcode the front-end designs.



Home page of the fully functional tool

Blitz testing before global release

Given the short time we had between global release, since our next cycle of performance review is coming soon we wanted Atlassians to have access one week before the performance cycle starts to prepare them for this upcoming self-assessment.

I lead the design team and the engineering team to QA all our features; including updating UI components, adding confirmation modals and updating the UX writing to match Atlassian standards.

I also created the branding logo for the tool, which we used in all of our releases and our loading screens.

Collaboration with the Design Operations team

I reached out to our design operations team who I've collaborated with on other projects as well for the communication strategy. Together with our lead design operations lead we collaborated on the announcement strategy for where, when and how we're going to release the feature.

I wrote up an official release blog post including introducing the tool as well as how to guide and any additional answers to anticipated user questions. For the blog and communications I created a new space for all the projects

— **Apex Wrapped** is an AI-powered tool designed to simplify the Apex process by compiling relevant links and summaries based on user-defined goals. It fetches all Atlas tickets, Jira tickets, Kudos and Confluence pages you've worked on, sorts and categorises them according to your goals, and generates a 300-word AI summary for any chosen pillar.

Apex Wrapped is designed to help you **SAVE time in Apex** by compiling a list of everything you have done over a given time period before you jump into Elevate or Confluence.

? How does Apex Wrapped work

🔗 1. Finding your work

🔗 **Apex Wrapped** can help you find your work in our most-used Atlassian apps.

This includes our,

- Atlas 🌐
- Confluence Cloud ☒
- Jira Cloud 🚀
- Kudos 🗣️

🔒 Apex Wrapped will only return the content that **you have permission to see**. Some content may have restrictions and might not be available to everyone. For instance, if you create a page and restrict it to yourself, this will only show up in your Apex Wrapped.

🏷️ 2. Categorising and sorting your work

We have 3 different levels of categorisation **RELEVANT LINKS** **ADDITIONAL LINKS** **OTHER LINKS**

Apex Wrapped will categorise your links based on your goals, growth profile and any additional information you've provided.

RELEVANT LINKS - Links that **relate** to the information you provided.

ADDITIONAL LINKS - Links that **could be relevant** to the information you provided.

OTHER LINKS - Links that don't relate to any of the information you provided, but are listed just in case they could be useful.

💡 Tooltips on the right of every link provide context on why the link has been included. You can hover over or click on the tooltip to access the information.

📄 Generating your 300-word summary

Once you have selected the links that you want to be used as a reference in your summary, Apex Wrapped will generate a 300-word summary based on all of the content provided.

This summary will be based on:

- The links you selected in the previous step.
- Your goals and the additional content you provided in the first step
- Your growth profile

This 300-word summary will be automatically saved, so if you leave and come back again, you should not lose any progress.

To generate another summary, you need to **clear your existing summary** for any given pillar and press the generate button once again.

Screenshot of a page of the blog that explains the tool

I also created a help channel on slack our main communication platform at Atlassian to manage any user requests or issues in which our team can quickly help fix paired with the announcement.



Low-fidelity png

Redesign of the Apex wrapped prototype “Summed up”

Due to Apex wrapped being an internal tool that we created I redesigned the entire experience and adding requested features and improvements to this working prototype.

New features:

- Peer feedback
- Overall summary
- Easier navigation (between pages)

