

Performance Evaluator

360° evaluator for transparent
performance appraisals



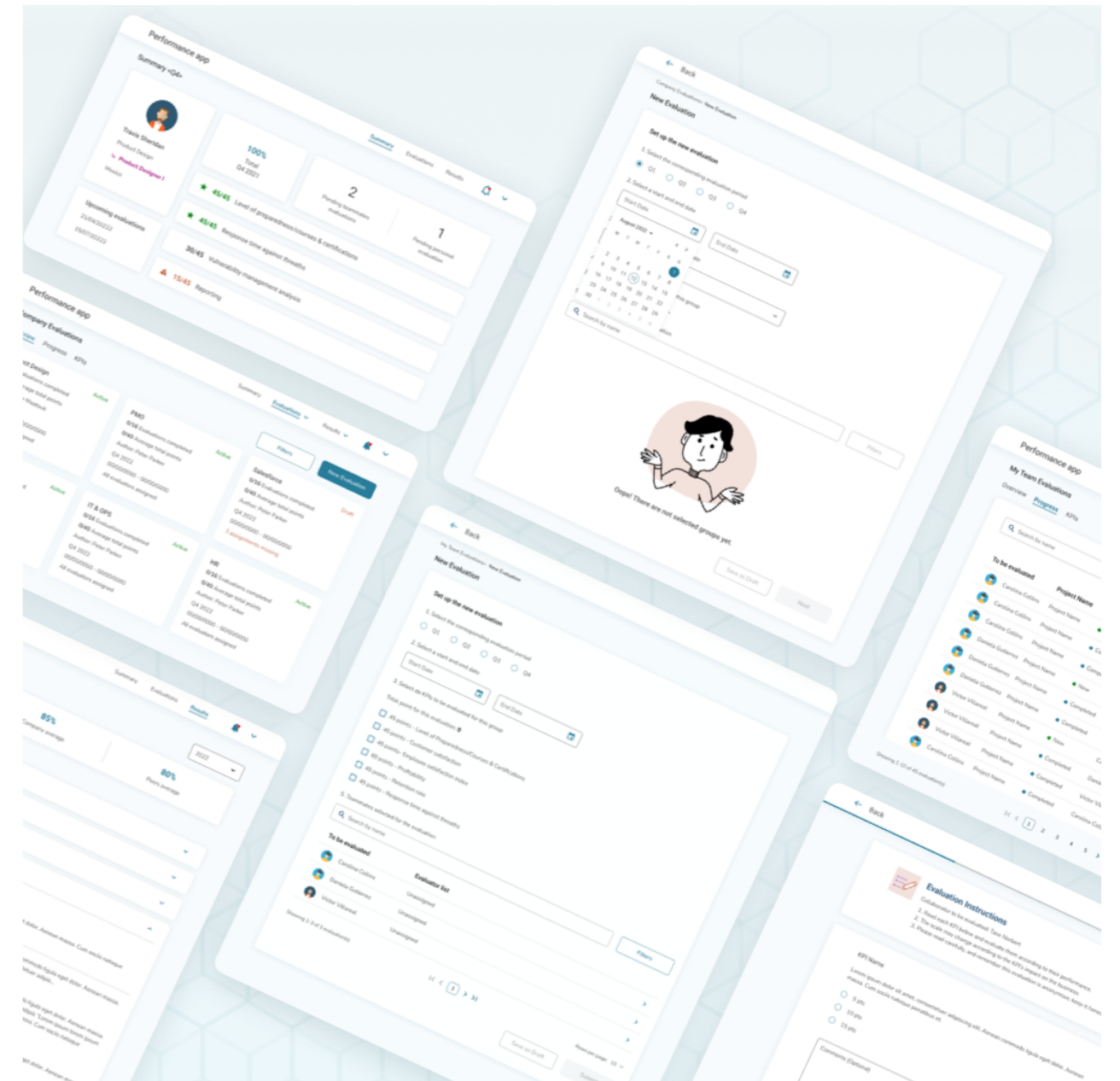
Project Overview

The product

The Performance Evaluator is a 360o evaluation system, which means that in order to have a fair and clear appraisal, each member of the company will have the ability to evaluate and be evaluated by their peers, managers and external clients.

Project Duration

8 weeks



Project Overview

The problem

Each department in a company has unique tasks, so evaluating everyone by the same criteria could hurt the objectivity of the results.

The goal

To create a system that would specifically evaluate the KPIs of each department, integrate the feedback from peers, managers and clients, and show HR the results of the company in a unified way.

Project Overview

Our Role

From benchmarking to conducting research with experts, our team focused on understanding user needs so we could create a product that would satisfy employees, managers and HR.

Responsibilities

- Research
- Interface design
- User testing
- Support for web development

Understanding the User

- User Research
- Personas
- User Journey Maps

User Research

Summary

Since one of the goals for this platform was to be an evaluation tool for everyone within a company but also work as a resource for HR to access important information, the first step was to divide the profiles of the different users as follows:

- Employees: able to see their own results and evaluate other people.
- Managers: able to see their own results and their teams, provide feedback and create evaluations.
- HR: able to see their own results, the company results, provide feedback, create evaluations and send reminders.
- Externals: able to see the relevant KPIs and evaluate the employees.

After having the required profiles, we did a benchmark and interviews with experts to be able to decide which features to integrate and what level of hierarchy each one should have.

Pain Points

Lack of transparency

Employees should have transparency about how the company measures their performance.

Vertical approach

The evaluation of an employee should not only depend on the opinion of superior positions.

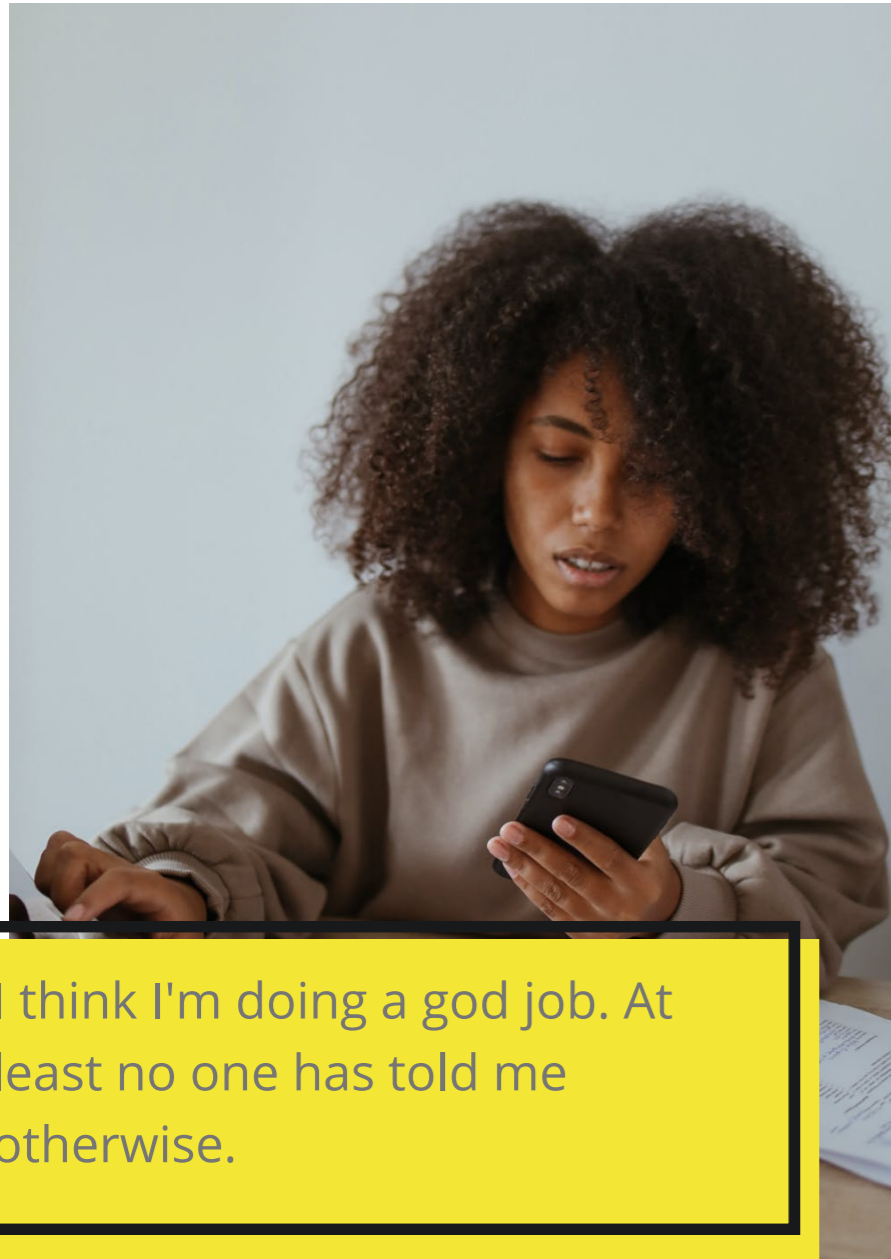
Anonymity balance

Despite the transparency, it is necessary to keep anonymity while evaluating peers. Feeling exposed can change certain answers.

General KPIs

Different areas perform different tasks so the measured KPIs should change accordingly.

User Persona



I think I'm doing a god job. At least no one has told me otherwise.

Ana

- 👤 24 years old
- 📍 California
- 💼 Junior engineer

Bio

Ana is a young developer and she is currently in her first job since she graduated from college. Lately she is not really sure about whether she is doing a god job in her position. She doesn't want to directly ask her peers, since she doesn't want to sound insecure about her skills.

Goals & Motivations

- Learn new things
- Grow professionals
- Feel satisfied with her daily activities
- Avoid unnecessary frustration
- Work responsibly but avoiding the burnout

Frustrations

- Being in non-transparent work environments
- Not having clarity about the job expectations
- Too much workload
- Not being able to express her opinion and feedback to people in the company.

User Journey Map

Phases of the Journey

Log in

Overview

Evaluations

Evaluation form

Results

Comparison

Doing

- Sign in with company credentials

- Sees the pending evaluations to do
- Sees the summary of the personal results of the last evaluation

- Goes to evaluations
- Sees that she has pending evaluations to do

- Enters the evaluation form
- Reads the instructions
- Submits the evaluation

- Goes to the results sections
- Search her latest results
- Reads the evaluated KPIs and her results

- Compares her results with the overall of the department

Thinking

- Expects to have easy and quick access to different types of information

- Expects to see the most important "score" first and then the reasons for getting that score.

- Wants to clearly understand between evaluations history and the evaluations that she has not yet filled out

- Expects to clearly understand the steps to follow
- Wants to clearly understand each KPI evaluated

- Wants to know if you she has improved in since her previous evaluation
- Wants to know why she got each score

- Wants to have a clear and measurable reference to compare

Feeling

+



-

Pain Points

- There is no quick way to compare this result with previous periods

- Some results need a qualitative complement

- There is no quick way to compare this result with previous periods
- There is no feedback about "bad" scores

Opportunities

- Add a sort or filter function

- Add an option to write a comment after each punctuation

- Add a sort or filter function
- Add an option to write a comment after each punctuation

User Persona



Manuel

- 👤 34 years old
- 📍 Barcelona
- 💼 IT Manager

Bio

Manuel works in a communication company and he has been in charge of a medium size team for two years. Currently the company where he works will grow a lot and Manuel's team could double in just a few months.

Goals & Motivations

- Help people grow professionally
- Teach new skills
- Find ways to improve
- Solve challenges with social impact

Frustrations

- Not being able to run the day's work
- feeling stuck
- Ambiguous job requirements
- Put his work before his mental health

If the company is going to grow, the systems must be more practical.

User Journey Map

Phases of the Journey



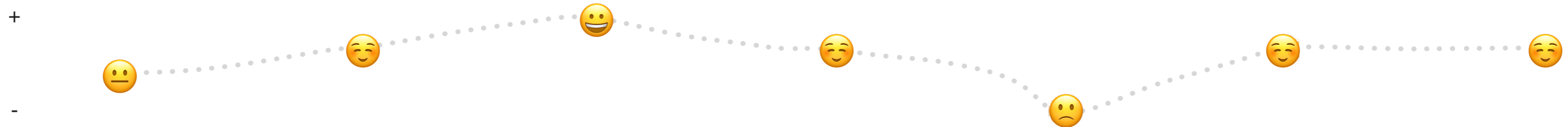
Doing

- Log in**
 - Sign in with company credentials
- Overview**
 - Sees Personal Overview
 - Sees the general summary of the department
- Progress check**
 - Enters the evaluations
 - Checks the progress of your department
 - Verifies that there are no pending evaluations for your team
- Create evaluation**
 - Creates a new evaluation for the next quarter
 - Sets the dates
 - Set KPIs to be evaluated
- Evaluators assignment**
 - Assigns appraisers to each appraiser
- Information review**
 - Enters the results section
 - Compares results.
 - Enters the results of an specific person
- Comparison**
 - Compares a person's results with the average of the department

Thinking

- Log in**
 - Expects to have easy and quick access to different types of information
- Overview**
 - Knows if the department is doing ok
 - Not feeling overwhelmed by the amount of information.
 - Do not confuse the personal results with the company results
- Progress check**
 - Hopes to see the list of employees who have not yet finished their evaluations
 - Want to see who has been fully evaluated
- Create evaluation**
 - Expects a quick and replicable process.
- Evaluators assignment**
 - Wants to have good references to assign the most suitable evaluators to each case
- Information review**
 - Correctly differentiate between each category of results.
 - Keep the process for reviewing information short and practical
- Comparison**
 - Expects it to be easy to compare and relate this results to other data.

Feeling



Pain Points

- Overview**
 - Differentiate personal data as evaluated employee and the results data of other people
- Progress check**
 - It is complex to directly remind people who have not yet completed their evaluation
- Create evaluation**
 - Needs to remember which KPS have not been evaluated this year
- Evaluators assignment**
 - The process is long
 - Knowing which evaluator to choose is a complex task with many variables
- Information review**
 - Difficulty comparing a large amounts of information
- Comparison**
 - Not understanding why an evaluator has given a certain score in an evaluation

Opportunities

- Overview**
 - Clearly identify the sections with corresponding labels.
- Progress check**
 - Adding a reminders feature
 - Having the possibility to categorize these people into one group.
- Create evaluation**
 - Having access to a KPI list with sorts and filters
- Evaluators assignment**
 - Having an option to save the evaluation as draft
 - Adding a "common projects" column to know which evaluator to choose
- Information review**
 - Adding sorts of filters to compare between quarters.
- Comparison**
 - Adding a comment option after each KPI evaluated so the answers could be better justified.



User Persona



Sara

- 👤 33 years old
- 📍 CDMX
- 📁 HR

Bio

Sara has more than eight years of experience working in human resources. She knows many ways to measure the performance of an employee and she is sure that good communication always helps improve the dynamic between all the company members.

Goals & Motivations

- Balance her personal and professional life.
- Find common goals with the company she works for.
- Operate in healthy environments.

Frustrations

- Work with non-innovative methodologies.
- Not communicating properly.

Best results are obtained when a diverse team gives its point of view and opinion.

User Journey Map

Phases of the Journey



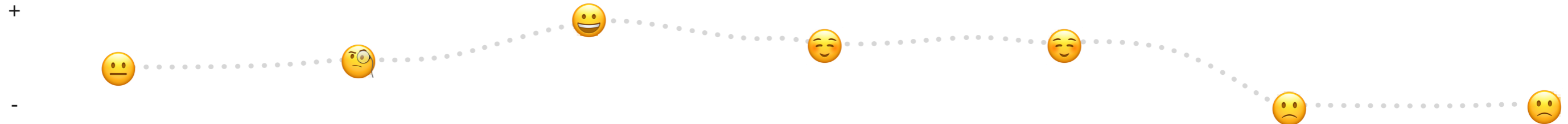
Doing

- Log in**
 - Sign in with company credentials
- Overview**
 - Sees Personal Overview
 - Sees the general summary of the department
 - Sees the general summary of the company
- Information review**
 - Enters the results section
 - Compares results by departments
 - Enters the results of an specific department
- Specific data check**
 - Enters the results of a person
 - Sees the KPIs evaluated and their scores
 - Digs deeper into a KPI score
- Comparison**
 - Returns to the results of the entire department
 - Compares a person's results with the average of the department
- Edit**
 - Enters to see the evaluation in progress of a department
 - Sees an error and wants to edit the evaluation.
 - Contacts the manager to make the changes.
- Communication**
 - Leaves the platform
 - Communicates with the manager to make the changes
 - Communicates with the employees to let them know about changes

Thinking

- Log in**
 - Expects to have easy and quick access to different types of information
- Overview**
 - Not feeling overwhelmed by the amount of information.
 - Do not confuse the personal results with the company results
- Information review**
 - Correctly differentiate between each category of results.
 - Keep the process for reviewing information short and practical
- Specific data check**
 - Expects it to be easy to compare and relate this results to other data.
- Comparison**
 - Expects it to be easy to compare and relate this results to other data.
- Edit**
 - Expects to have control over ongoing evaluations
 - Hopes to have confirmation when making changes on the platform.
- Communication**
 - Wonders how she will be able to send the correct reminder to each specific person.

Feeling



Pain Points

- Overview**
 - Differentiate personal data as evaluated employee and the results data of other people
- Information review**
 - Difficulty comparing a large amounts of information
- Specific data check**
 - Not understanding why an evaluator has given a certain score in an evaluation
- Comparison**
 - There is no way to work with a large amount of data in a quickly way
- Edit**
 - HR people have visibility over all evaluations but the process of editing them is out of their hands.
- Communication**
 - Having to leave the platform
 - There is no easy way to notify employees about date changes

Opportunities

- Overview**
 - Clearly identify the sections with corresponding labels.
- Information review**
 - Adding sorts of filters to compare between quarters.
- Specific data check**
 - Adding a comment option after each KPI evaluated so the answers could be better justified.
- Comparison**
 - Add option to download data as csv file
- Edit**
 - Give HR people the ability to edit ongoing reviews.
- Communication**
 - Adding common types of automated reminder in the platform



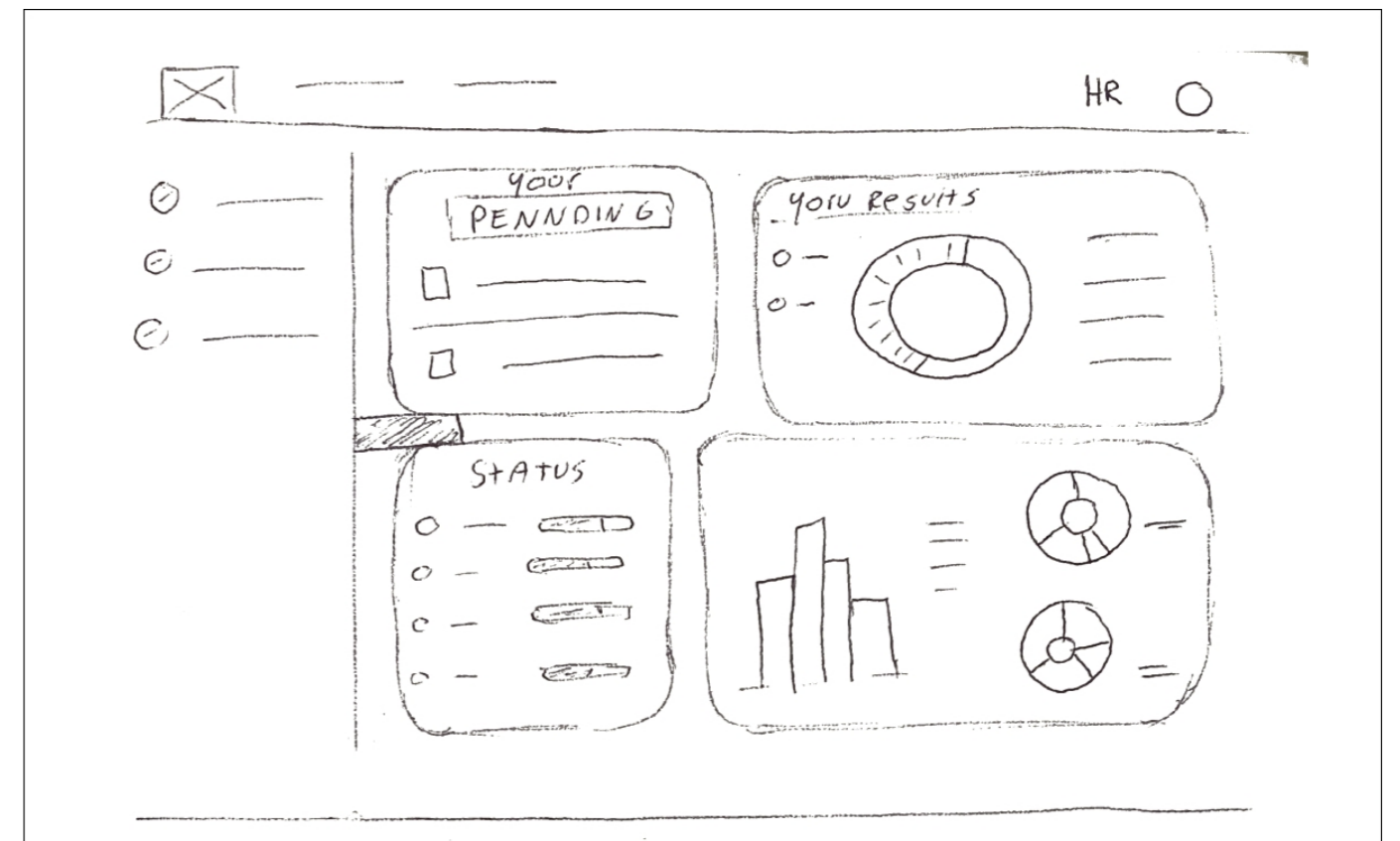
Starting the Design

- Paper Wireframes
- Digital Wireframes
- Usability Testing Findings

Paper Wireframes

Process

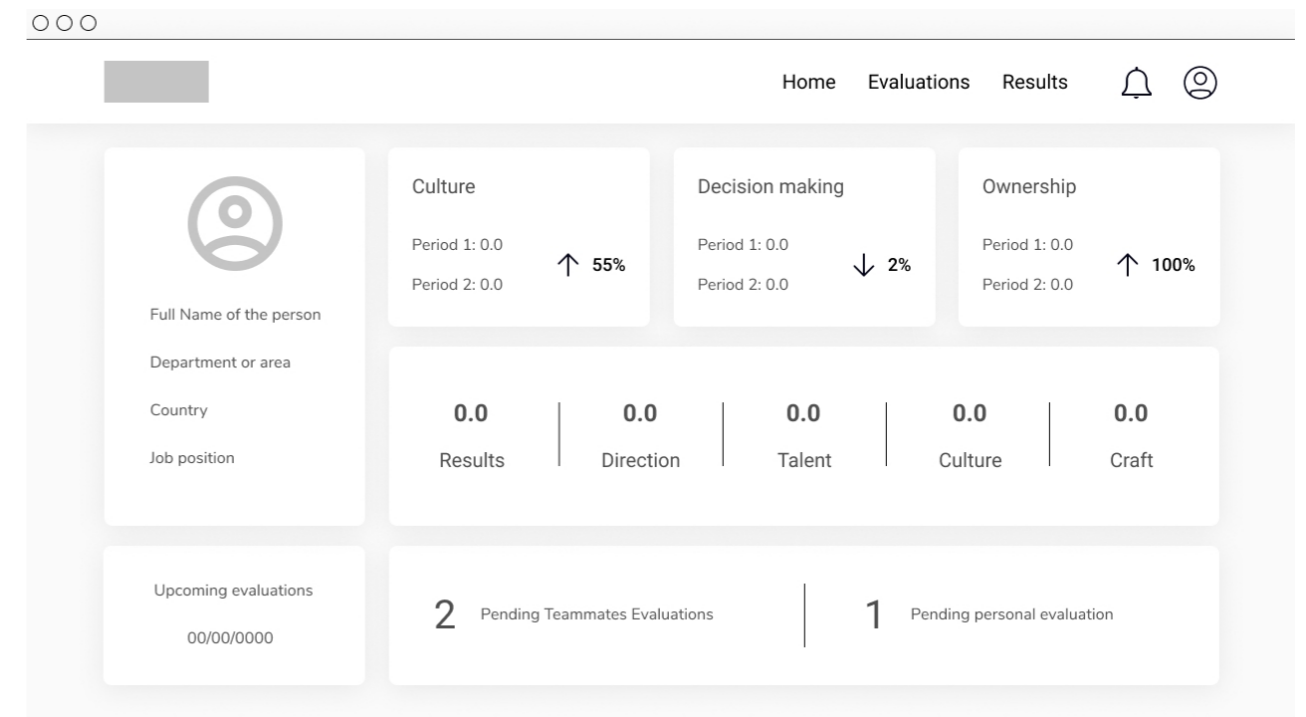
The wireframes stage was useful to establish and detail all of the elements and features. For example, although the graphs were the main resources proposed to represent information, this had to change to numerical values in order to meet the client's technical requirements.



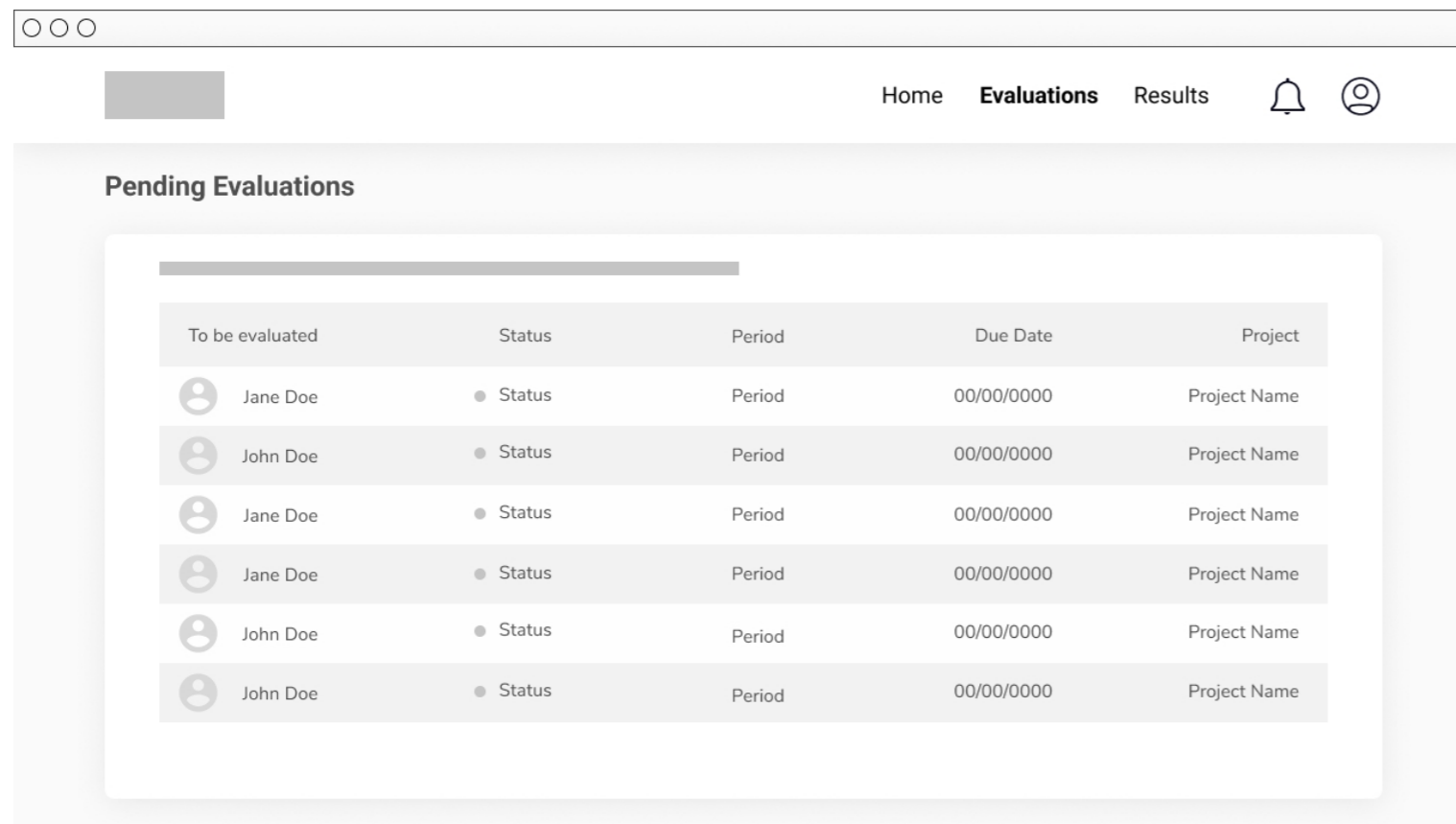
Digital Wireframes

Process

Once we have established the features, the hierarchies and the basic style of the components, we created the digital wireframes. This allowed us to efficiently validate the designs with experts and other important stakeholders.

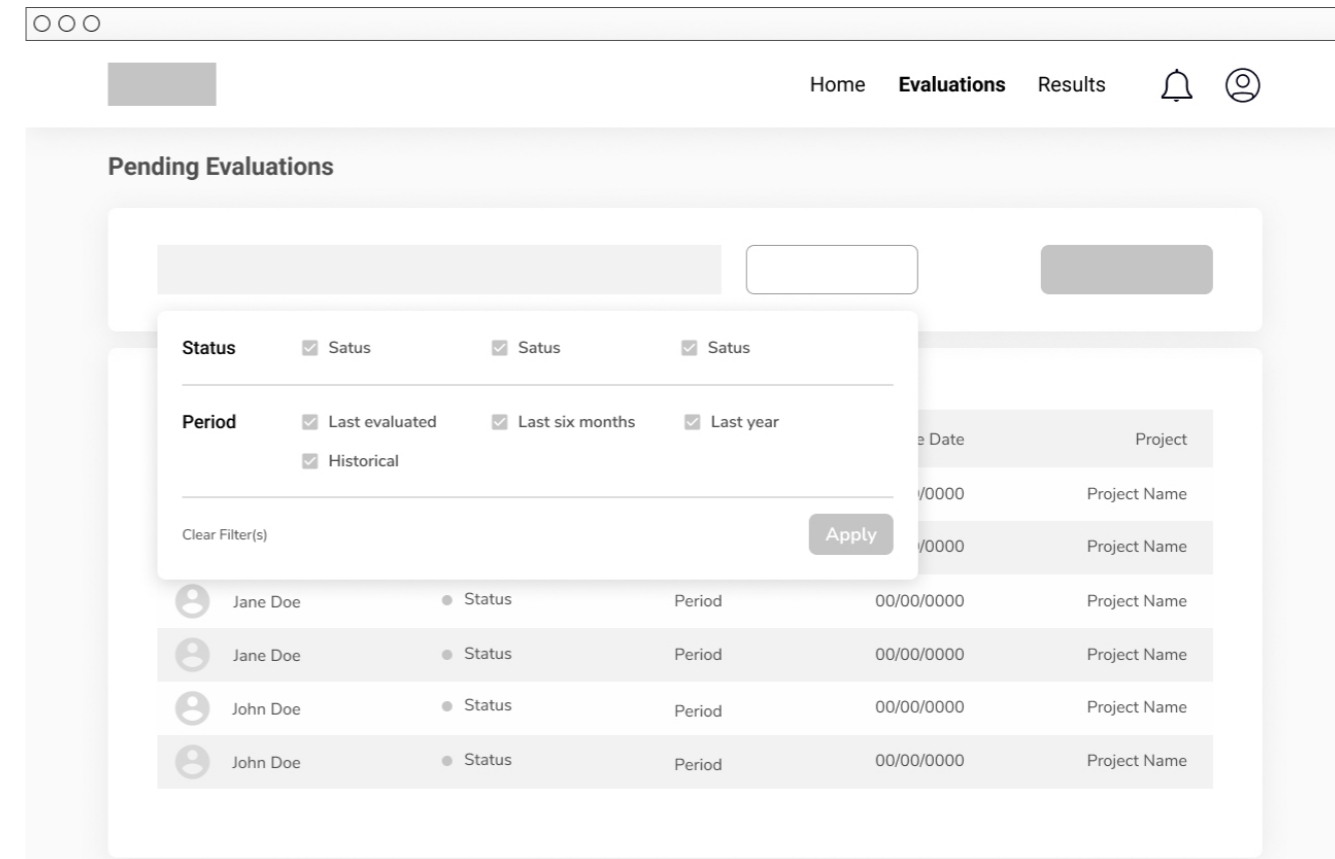


Digital Wireframes



Evaluations lists

The user has the option to see the historical evaluations and the ones that still have to be completed.

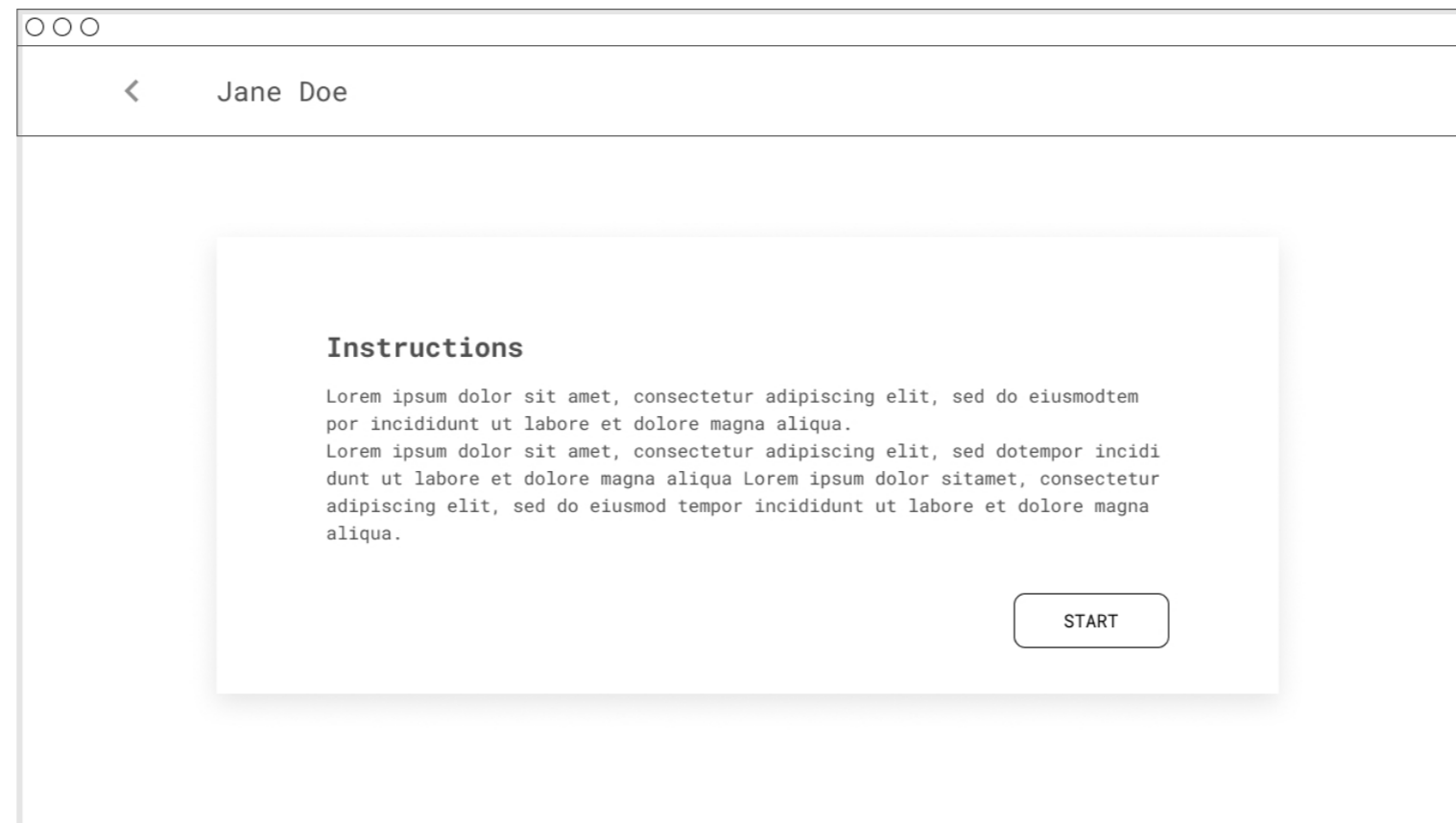


Evaluations filters

For easier interaction, it is possible to filter evaluations by status and by period. This helps managers and HR people, since they have access to a large number of evaluations.

Digital Wireframes

We added instructions so that the user could have a better understanding of the evaluation system that is going to be applied in the evaluation forms.



A user evaluates more than one person. The name of the person to be evaluated is kept at the top of the page, to avoid potential future errors.

Findings

Usability Testing

After evaluating the wireframes with a group of specialists, the findings were:

- HR people should be able to access all the information about the evaluations, even if they are not the ones who set it up.
- The evaluation score should change depending on the selected KPI.
- The system should show the scores even when all of the evaluations are not finished.
- Users should be able to compare themselves to a global average score.
- Selecting evaluators should be a customizable process.
- User should be able to automatically send evaluations on certain dates by programming them in the platform.

Refining the Design

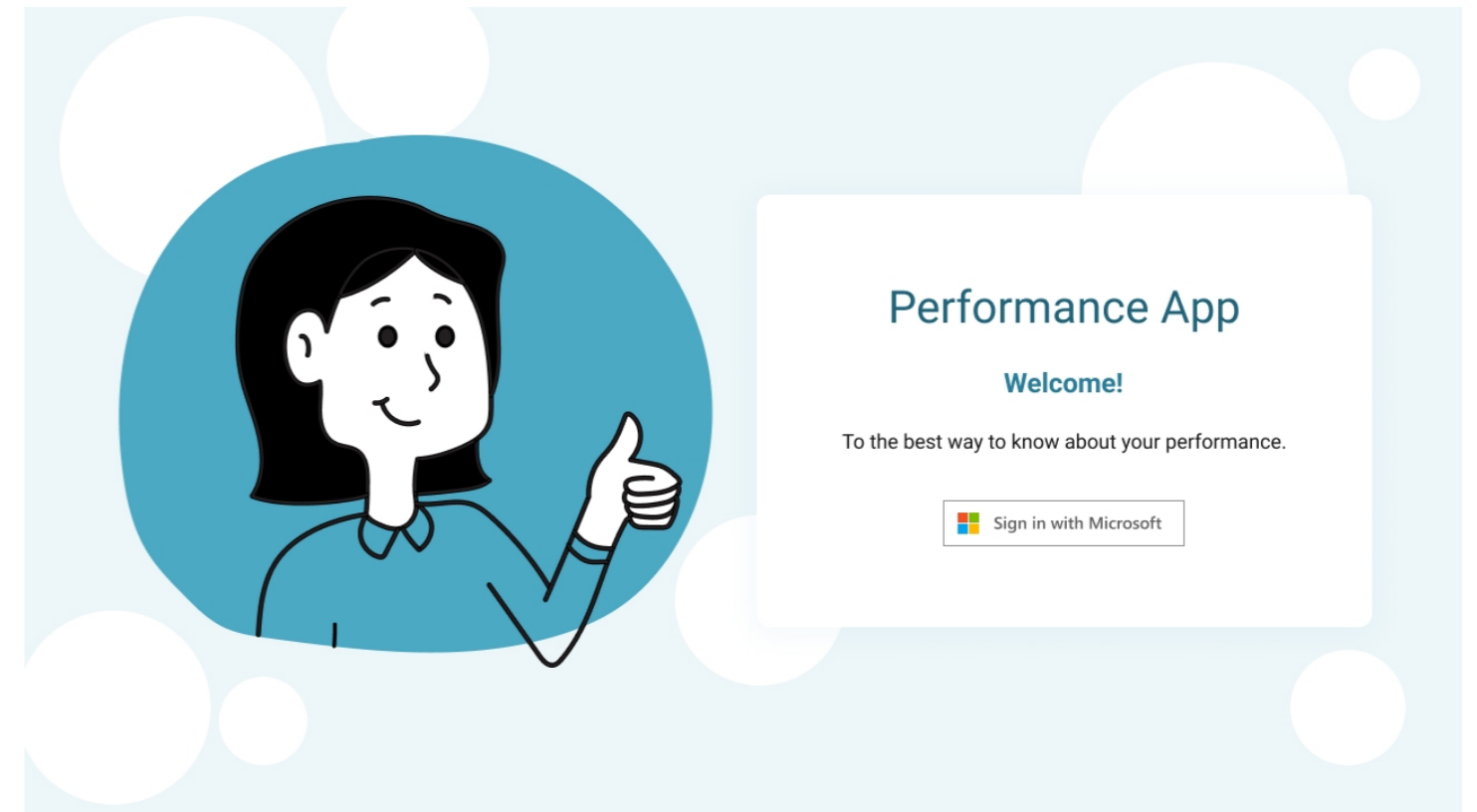
- Mockups
- High - Fidelity Prototype
- Design System
- Accessibility

Mockups

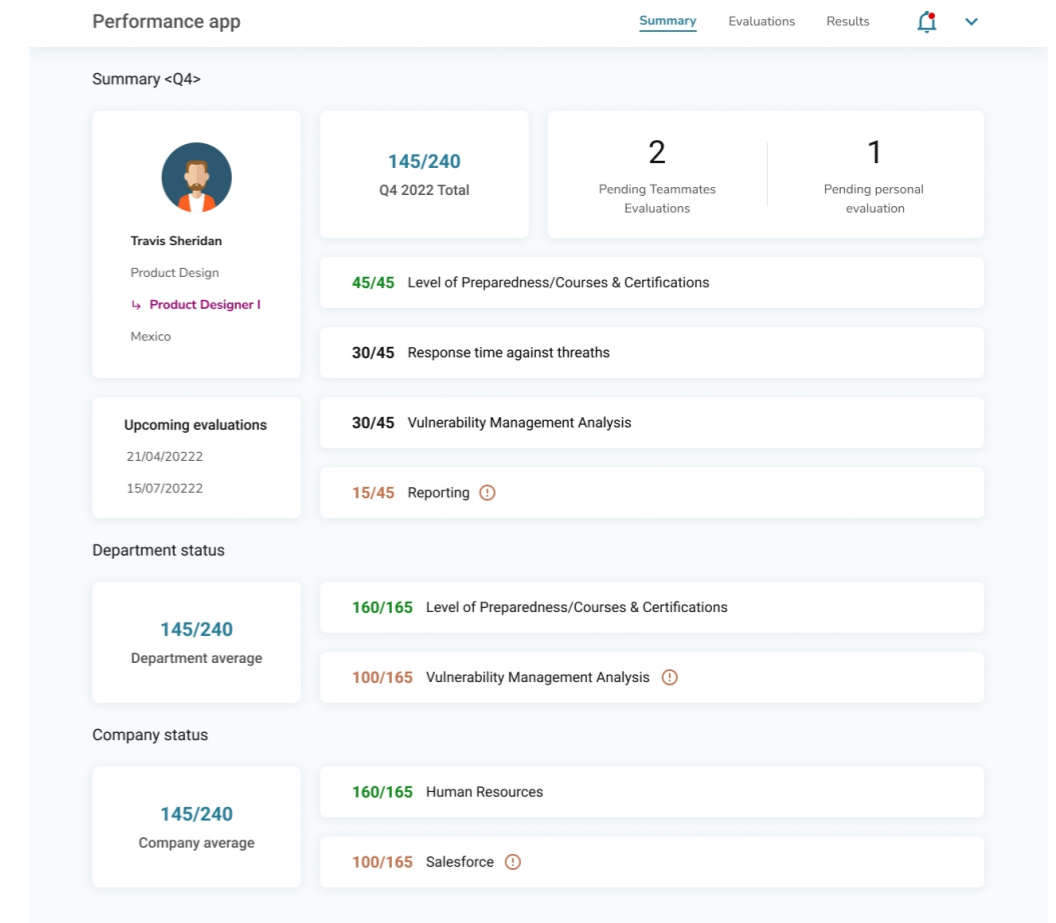
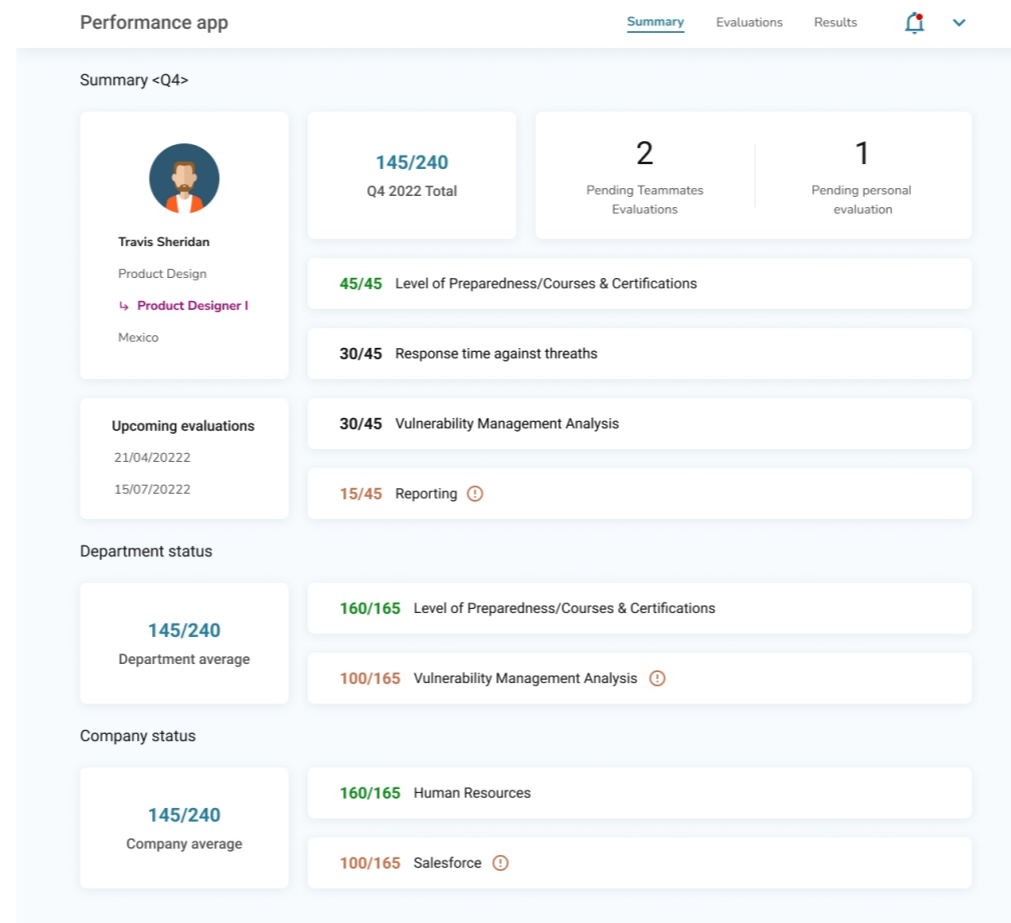
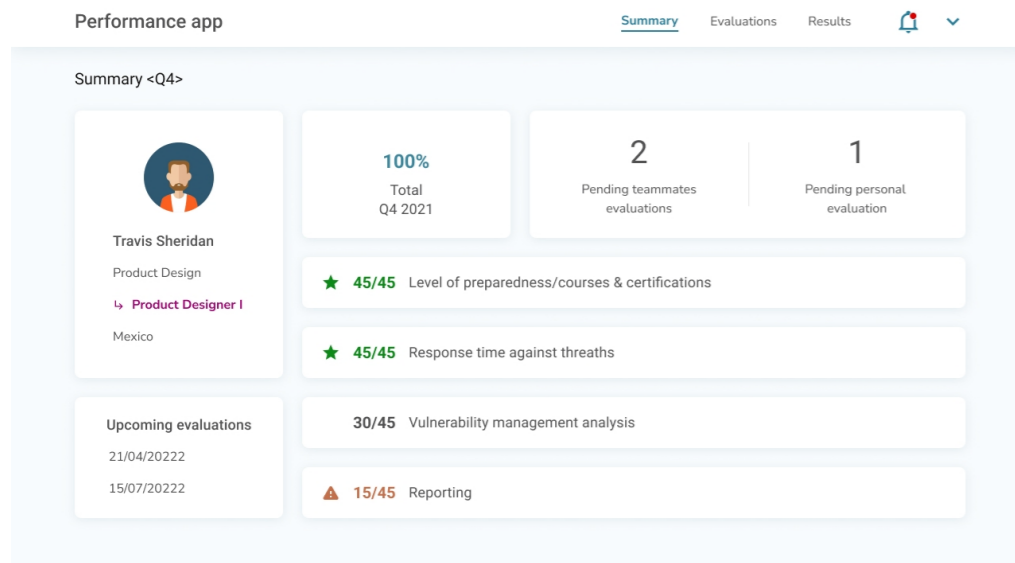
Process

The high-fidelity mockups allowed us to show the different stakeholders the final design result and to ensure that we covered all the requirements before moving on to the development stage.

These mockups were also used to create a second round of user tests and to establish new areas of improvement in interaction, usability and accessibility for a second version of the product.



Mockups



Summary page

Although the platform will be used by different types of users, the components and brand guidelines remained consistent.

Mockups

Performance app

Summary **Evaluations** Results

Company Evaluations

Overview Progress KPIs

Filters New Evaluation

Product Design Active

7/16 Evaluations completed
35/40 Average total points
Author: Nour Maatouk
Q4 2022
00/00/0000 - 00/00/0000
All evaluators assigned

PMO Active

0/16 Evaluations completed
0/40 Average total points
Author: Peter Parker
Q4 2022
00/00/0000 - 00/00/0000
All evaluators assigned

Cybersecurity Draft

0/16 Evaluations completed
0/40 Average total points
Author: Peter Parker
Q4 2022
00/00/0000 - 00/00/0000
3 assignments missing

Recruitment Active

7/16 Evaluations completed
35/40 Average total points
Author: Nour Maatouk
Q4 2022
00/00/0000 - 00/00/0000
All evaluators assigned

IT & OPS Active

0/16 Evaluations completed
0/40 Average total points
Author: Peter Parker
Q4 2022
00/00/0000 - 00/00/0000
All evaluators assigned

HR Active

0/16 Evaluations completed
0/40 Average total points
Author: Peter Parker
Q4 2022
00/00/0000 - 00/00/0000
All evaluators assigned

Company Evaluations

HR people have access to this section and although they usually don't create the evaluations, they can see, track, edit and even delete them.

Performance app

Summary **Evaluations** Results

My Evaluations

My Evaluations
My Team Evaluations

Search by name Filters

To be evaluated	Status	Project	Period ↑	Year	Due Date
Balbina Sóley	New	Project Name	Q1	2022	00/00/0000
Tase Norbert	New	Project Name	Q1	2022	00/00/0000
Anne Sharif	Expired	Project Name	Q4	2021	00/00/0000
Robert King	Completed	Project Name	Q4	2021	00/00/0000
Balbina Sóley	Completed	Project Name	Q4	2021	00/00/0000
Tase Norbert	Completed	Project Name	Q4	2021	00/00/0000
Anne Sharif	Completed	Project Name	Q3	2021	00/00/0000
Robert King	Completed	Project Name	Q3	2021	00/00/0000
Balbina Sóley	Completed	Project Name	Q3	2021	00/00/0000
Tase Norbert	Completed	Project Name	Q3	2021	00/00/0000

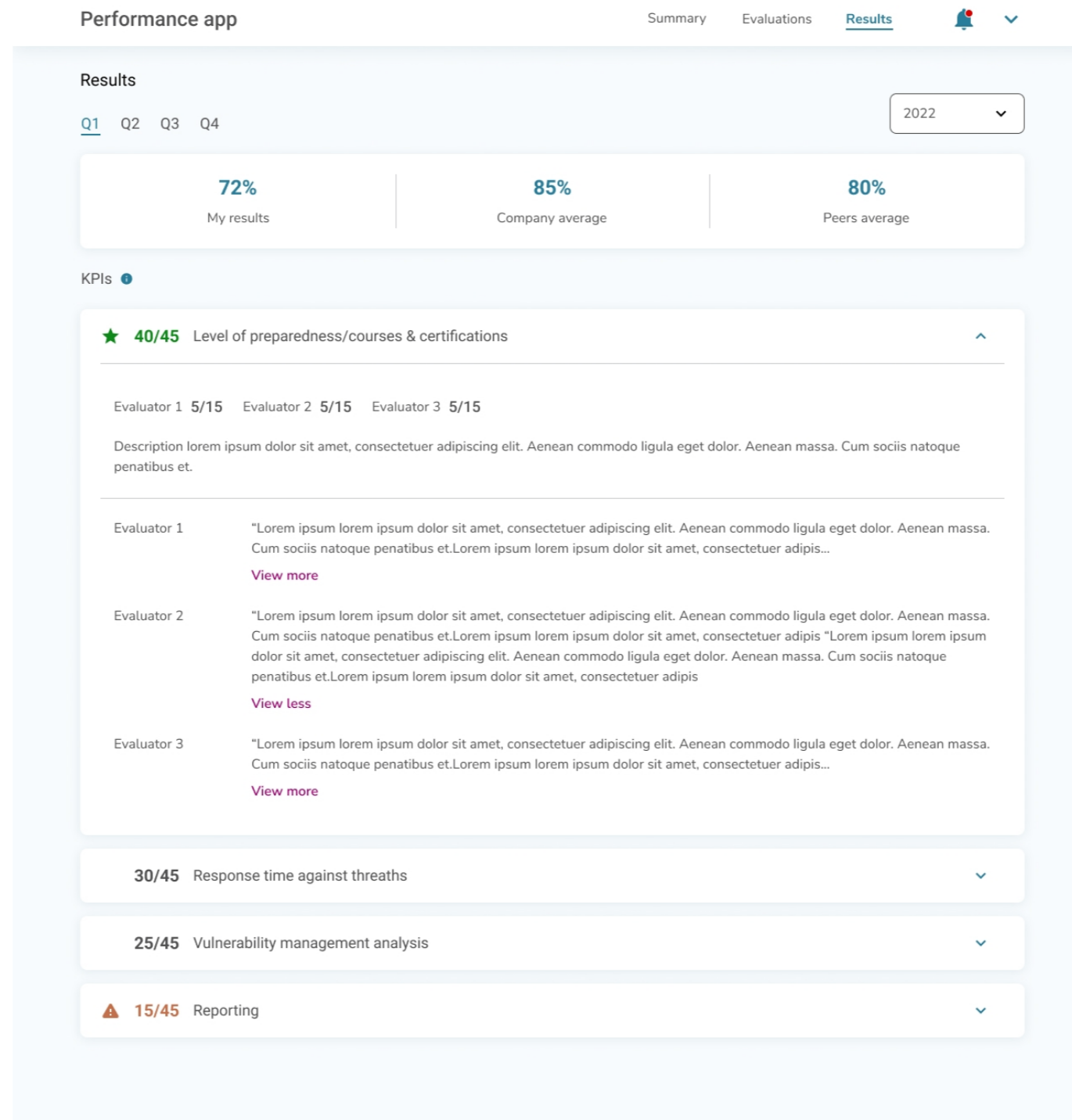
Showing 1-10 of 10 evaluation(s) |< < 1 > >| Rows per page: 10

My Evaluations

All roles have access to this section and here it is possible to view what evaluations have been assigned to you and the status of each.

Mockups

For a better context, the results have general percentages and the comparison with the company averages.



Each KPI has its score broken down and it is even possible to see comments that the evaluators left for each of these.

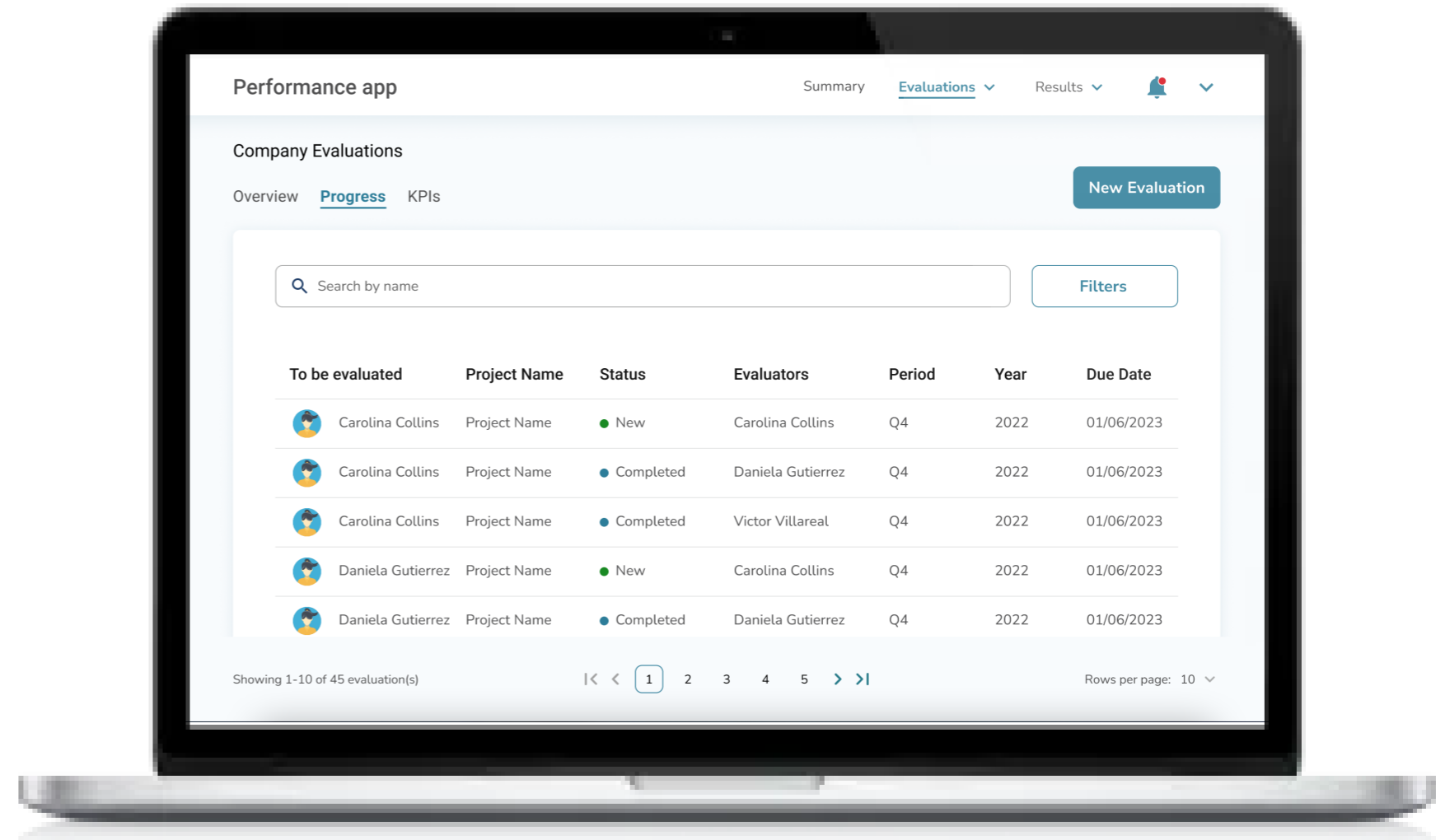
High - Fidelity Prototype

Prototype Link

[Employee prototype](#)

[Manager prototype](#)

[HR prototype](#)



Design System

Process

Since the Performance Evaluation is part a digital product family, the design system used was already created. It was necessary to redesign some components in order to have a better interaction and more consistency between this and other platforms.

When to use this?

It is used to highlight the main actions throughout the platform.

When not to use this?

It should not be used for those actions that have a low or medium emphasis.

How it works?

Pressing this button will help the user to perform the most important actions on the entire platform

Reference

- [States by Material Design](#)
- [Focus state by Medium](#)

Interaction States



Accessibility Considerations

Accessibility in current features

- Color contrast AA minimum
- Minimum font size
- Use of icons to support texts
- Instructions before an evaluation
- Good information architecture
- Good SEO practices

Going Forward

- Takeaways
- Next Steps



Takeaways

Impact

By obtaining clear results, it will be possible to better evaluate all people in a company and improve the efficiency of the company's processes. Being transparent about the KPIs and the performance also helps preventing future possible frustrations.

Learnings

A complex functioning application must still keep simplicity in the interface.

Next Steps

What's next?

- Audit to know what can be improved
- Improve certain features based on the usability reports
- Create a backlog of the features to improve in next iterations

**Thanks for
tuning in! 🙌**

