Katherine Okpara

Senior UX Researcher

About Me

Who I am

- Brain and behavior enthusiast
- Based in San Francisco, CA
- Senior UX Researcher
- Passionate about connecting with people from all walks of life

What I do

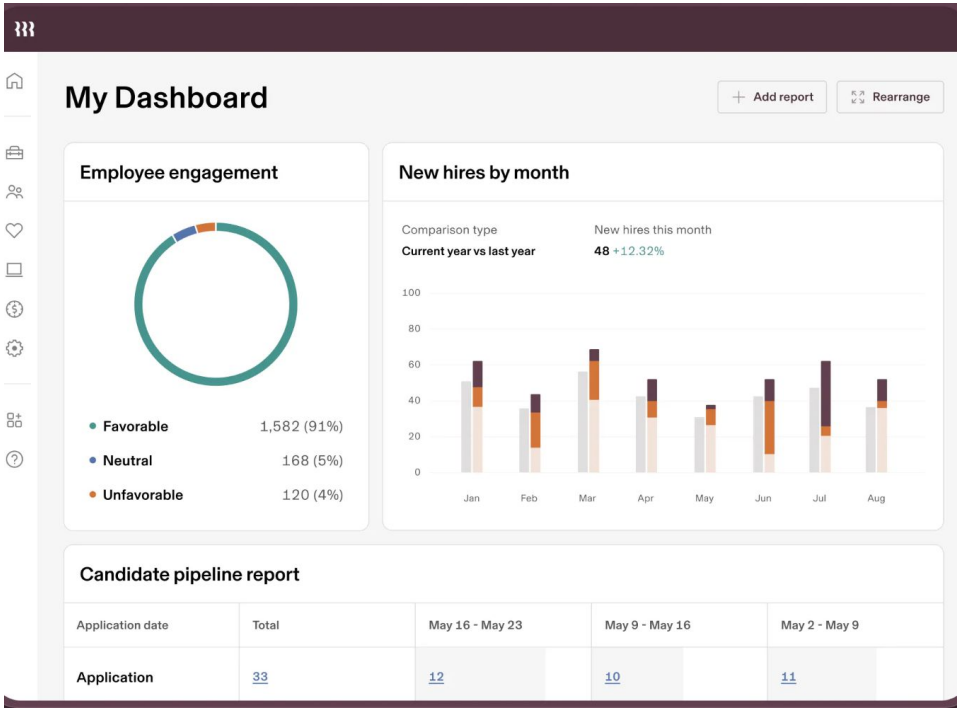
- Deeply understand the motivations, goals, and needs of users
- Generate actionable insights and help teams define and evolve the product direction
- Create action plans for incorporating insights into business objectives

Case Studies

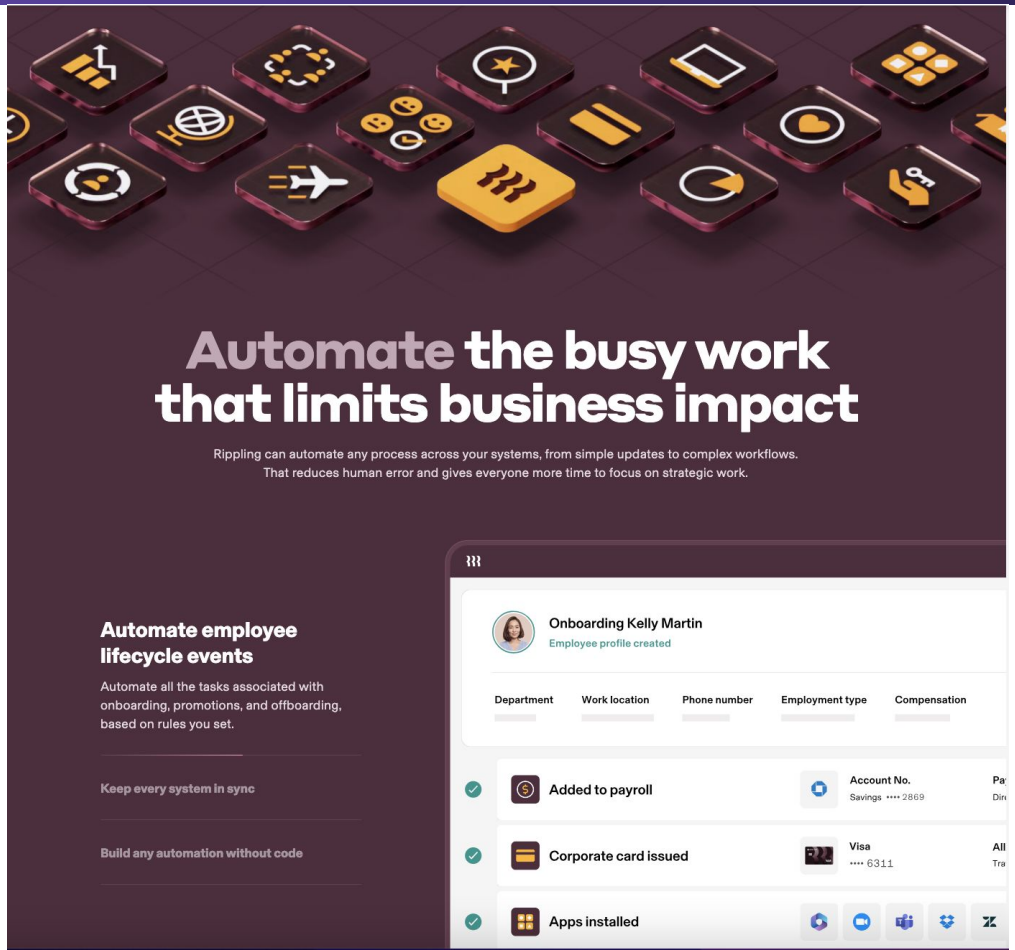
Illustration by Storyset

Case Study

Unifying workforce analytics through dashboards on www.rippling.com



Background: What is Rippling?



Dashboards foundational research, February 2022- April 2022

Problem space: Customers were struggling to gain high-level insights from Rippling reports and started seeking out external dashboard solutions

What

Conduct research to learn:

- How customers expect to interact with Rippling data
- What data is most important
- How they interpret the terminology used Rippling

Why

- Better understand the mental models of Rippling customers
- Uncover challenges in managing and tracking data
- Transform insights into design concepts

How

- User interviews (n = 15)
- Concept testing (n = 6)
- Usability testing (n = 8)
- Competitive analysis

Key research questions

How do admins interpret the word “dashboard”?

What is top of mind when admins log into Rippling?

How and when do admins report on data trends?

What metrics/data do admins track about their employees and systems?

How do admins share and collaborate on data reports?

Dashboards foundational research: high-level overview

- **Duration:** 3 months (February 2022 - April 2022)
- **Role:** Sole UX Researcher, collaborating closely with a product designer, product manager, and CEO
- **Mixed-method approach:** Conducted exploratory user interviews, concept testing, usability testing, competitor research, and desk research
- **Results and impact:** Insight into key customers goals and challenges, iterations on the dashboard design, and a refined product roadmap

Key insights from foundational dashboards research

Main Jobs To Be Done (JTBD) of admins in Rippling

Identify and respond to business, system, and employee issues	• Dig into a specific problem that popped up • Look up data to resolve and issue on behalf of an employee • Respond to requests
Analyze business, system, and employee data	• Understand key business questions stakeholders have • Gather data across tools and systems • Analyze data by dimensions such as department, location, level, DEI, etc
Curate, share, and present data to stakeholders	• Organize data into a format that is easy to consume • Determine the appropriate level or access to give to different stakeholders • Share data with stakeholders at a regular cadence
Stay in compliance	• Ensure that employees are following company protocols/guidelines • Run compliance-related reports • [When required] Submit records to 3rd party compliance orgs

Key goals, jobs-to-be-done, and metrics for each persona

HR

Key Goals and JTBD

Improve organization efficiency

Keep employee record up-to-date

Attract and retain talent

Monitor employee engagement

Understand resourcing needs across the company

Metrics they're tracking:

Total Headcount (Month over Month)

Turnover rate (Month over Month)

Onboarding task completion rate

Training completion rate

Attrition rate

Headcount by dept/level/race/gender

Finance

Key Goals and JTBD

Track events and changes that have payroll implications

Approve & run payroll

Create reports for auditing

Ensure that company isn't double-paying employees

Metrics they're tracking:

Total company spend (Year to Date)

Monthly revenue

Headcount investment across segments (%)

Payroll journal report

Spend breakdown (last 30 days)

PTO usage report per pay run

IT

Key Goals and JTBD

Manage employee's apps, devices, inventory, and data

Manage app & device onboarding and offboarding

Scale and streamline growing organizations

Metrics they're tracking:

IT Spend (year-to-date or quarter over quarter)

Support metrics (e.g., average response time)

Application status report

Third party app usage

Employees outside of compliance

Insight 1: **Admins interpret the word "dashboard" as a visual, one-stop shop for things that need their attention**

This can include pending tasks, KPIs, trends, and insights – anything that helps them get an overview of the system.

What we should do: Surface key metrics, ongoing processes, tasks, and an overview of data on the dashboard

"Key information being presented in an overview fashion that allows you to see and understand a lot of information in a single view"

"Visual, one stop, need your attention, trends, KPIs that I think are important front and center when I open an app"

"Dashboard = tiles on a screen that give me a variety of things I care about and I want flexibility to configure those"

"To me it's just another word for homepage...the shortcuts. So the most important things or things that can be summarized"

"Just simple visual display data of like our employee population, where they're located, what employment types are there...insights and just like KPIs at the moment"

Insight 2: Admins interact with data in different modes and at varying cadences

"If it's a billing day, I'm usually monitoring that process and I'm doing those reconciliations. **The first part of the month, typically, I'll be working on closing the financial statements, getting reporting done, getting it ready for our board review,** which every month, prior to the second week of the month we have a meeting to go over financial results. After that, it really depends."

- Director of Finance

What we should do: (1) Display top KPIs, metrics, and tasks on the homepage dashboard (2) Create a new tab in the Reports app where admins can save data visualizations for different use cases (3) Surface data insights both after log-in and throughout the user's journey

Modes

Proactive data analysis

Reactive data interaction

Passive data consumption

Cadences

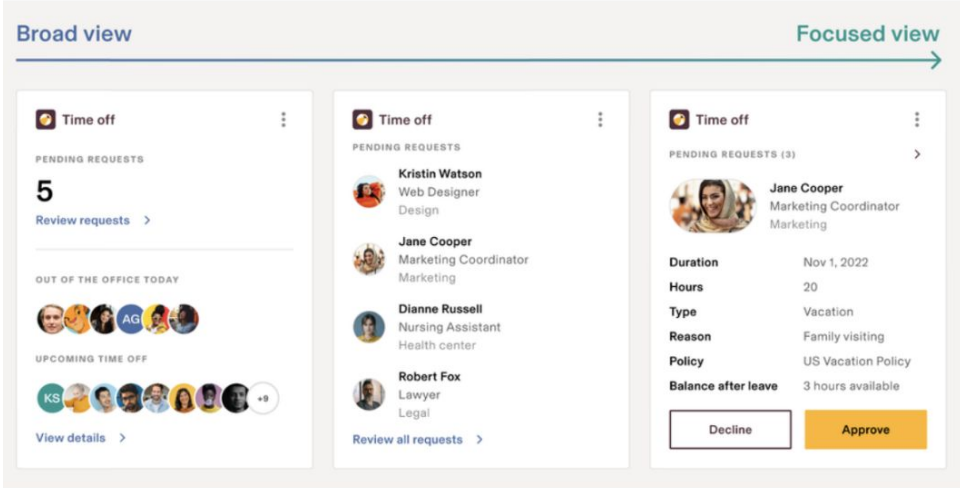
Daily: checking stats, responding to requests, monitoring trends

Weekly/Monthly/Quarterly: comparing trends over time, running reports, diagnosing problems

Insight 3: Checking status of tasks and ongoing processes is top of mind for admins after logging into Rippling

"**The primary reason why I log into Rippling is to gather data**, whether I need someone salary, for instance, someone's title, start date, end date, or if I need a report...**There's always something to do with the payroll, whether it's running it, adjusting something, adding, deducting, so forth.** And then of course, onboarding offboarding would be a big thing…"

- People Ops Manager

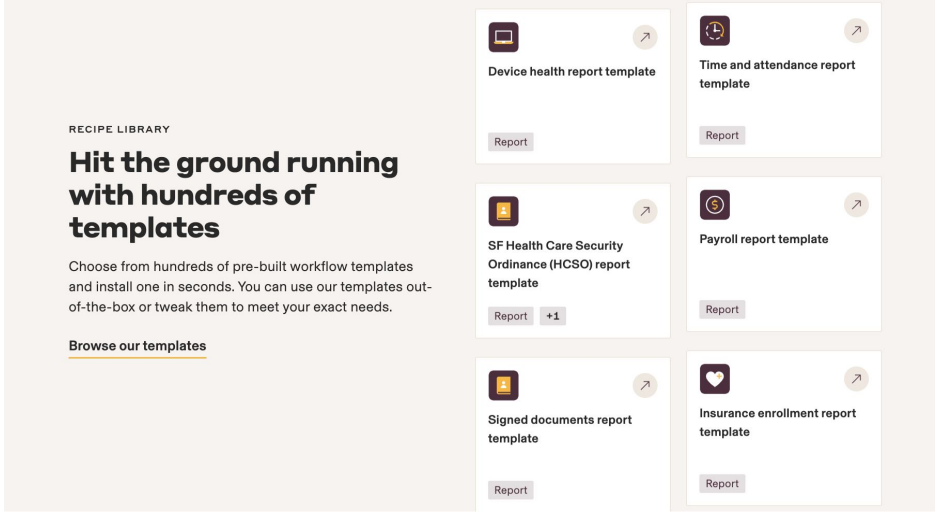


What we should do: Explore ways to display status/progress widgets on the homepage dashboard (e.g., completion of EE onboarding)

Insight 4: Admins struggle to easily extract high-level insights from Rippling data

“I can get [reporting data] for you, but I don't know if you're gonna be able to do anything with it. I don't have a way to visually represent it for you. It's not like a visual analytics tool. I can't build you a pie chart. So **I can give you a CSV file but you're on your own to manipulate it,** we don't have that skill set on our team.“

- People Ops Manager



What we should do: (1) Explore ways to simplify the reports configuration experience (2) Provide recommended dashboard templates that align with common business questions and use cases

Insight 5: Admins want to easily share data with their stakeholders at a regular cadence

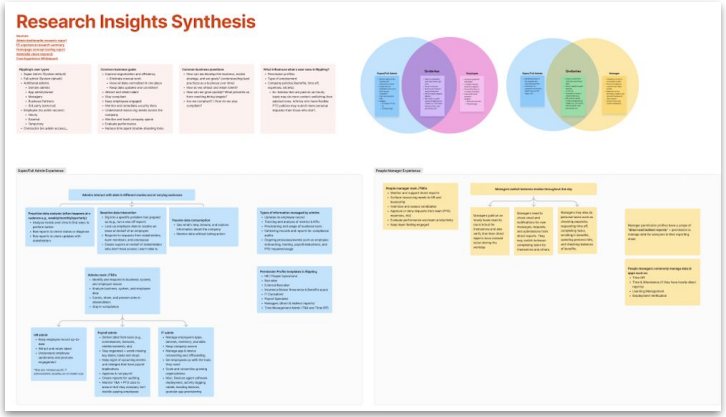
"We have quarterly board meeting. So if I'm in that cycle, I spend a lot of time on gathering materials and put a presentation together for the board…Some people tend to fall back on Excel even if they have access to Rippling."

- Director of Finance

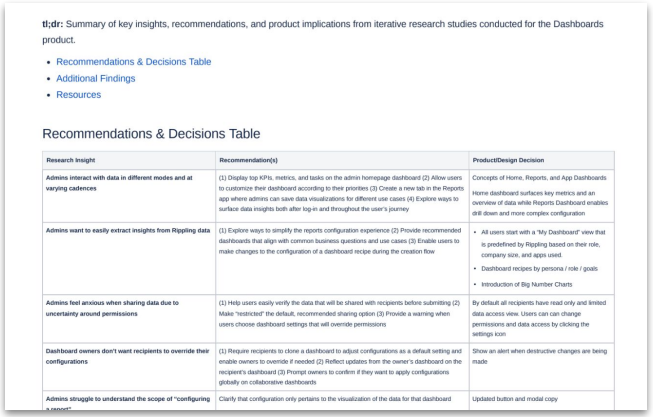
What we should do: Enable users to export reports to JPG, PDF, and XLS in near term; explore exporting to PPT/slides in the future

Sharing research insights with the team and broader company

After I finalized the key insights and recommendations, I created presentation materials to help me easily share research insights with the UX and Product departments and broader company.



Insights Synthesis Map in FigJam: A more visual way to meet designers where they were at and brainstorm



tl;dr: Summary of key insights, recommendations, and product implications from iterative research studies conducted for the Dashboards product.

- Recommendations & Decisions Table
- Additional Findings
- Resources

Recommendations & Decisions Table

Research Insight	Recommendation(s)	Product/Design Decision
Admins interact with data in different modes and at varying cadences	(1) Display top KPIs, metrics, and tasks on the admin homepage dashboard (2) Allow users to customize their dashboard according to their priorities (3) Create a new tab in the Reports app where admins can save data visualizations for different use cases (4) Explore ways to surface data insights both after log-in and throughout the user's journey	Concepts of Home, Reports, and App Dashboards Home dashboard surfaces key metrics and an overview of data while Reports Dashboard enables drill down and more complex configuration
Admins want to easily extract insights from Rippling data	(1) Explore ways to simplify the reports configuration experience (2) Provide recommended dashboards that align with common business questions and use cases (3) Enable users to make changes to the configuration of a dashboard recipe during the creation flow	• All users start with a "My Dashboard" view that is predefined by Rippling based on their role, company size, and apps used. • Dashboard recipes by persona / role / goals • Introduction of Big Number Charts
Admins feel anxious when sharing data due to uncertainty around permissions	(1) Help users easily verify the data that will be shared with recipients before submitting (2) Make "restricted" the default, recommended sharing option (3) Provide a warning when users choose dashboard settings that will override permissions	By default all recipients have read only and limited data access view. Users can can change permissions and data access by clicking the settings icon
Dashboard owners don't want recipients to override their configurations	(1) Require recipients to clone a dashboard to adjust configurations as a default setting and enable owners to override if needed (2) Reflect updates from the owner's dashboard on the recipient's dashboard (3) Prompt owners to confirm if they want to apply configurations globally on collaborative dashboards	Show an alert when destructive changes are being made
Admins struggle to understand the scope of "configuring	Clarify that configuration only pertains to the visualization of the data for that dashboard	Updated button and modal copy

Research Report in Confluence: Formal documentation in the form of a clear table of insights and recommendations

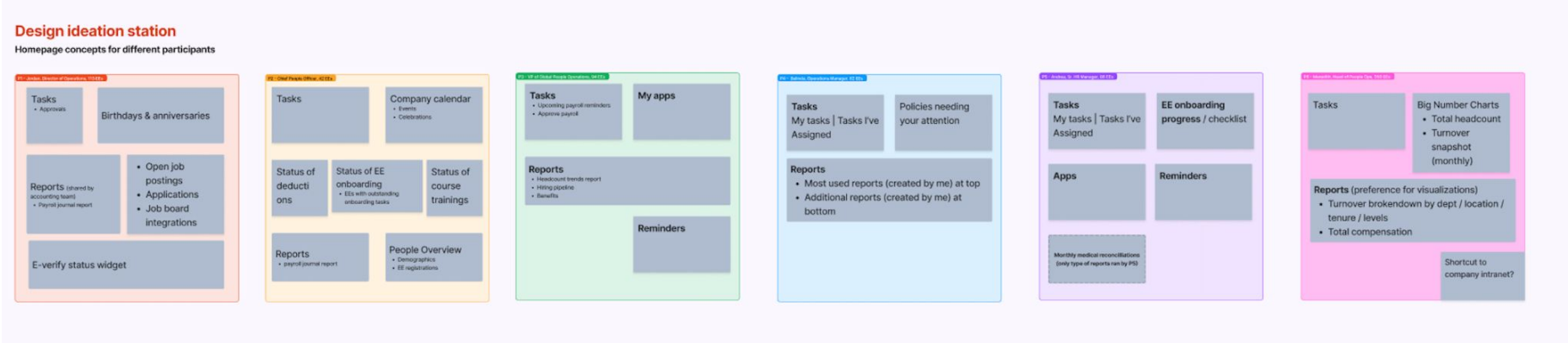
Design principles created based on UX research

Product Vision: Rippling users should feel welcomed, productive, focused, and engaged when they interact with the homepage dashboard

01	Create smart defaults and allow customization	• Design for the majority of common use cases while giving the user flexibility to tailor the experience to what is most important to them
02	Help users figure out what is highest priority for their day	• Surface directly relevant, urgent, or time-sensitive content • Promotional or non-urgent nudges/alerts should be transient and not in center of the homepage
03	Help users easily process information	• Provide users with a cohesive overview of the system • Balance various types of data and information to give a holistic report on what's new in the system
04	Avoid excessive content and overly complex interactions	• The homepage should provide information at a glance and save users time on key tasks • Consider performance and load times when adding visualizations to the homepage

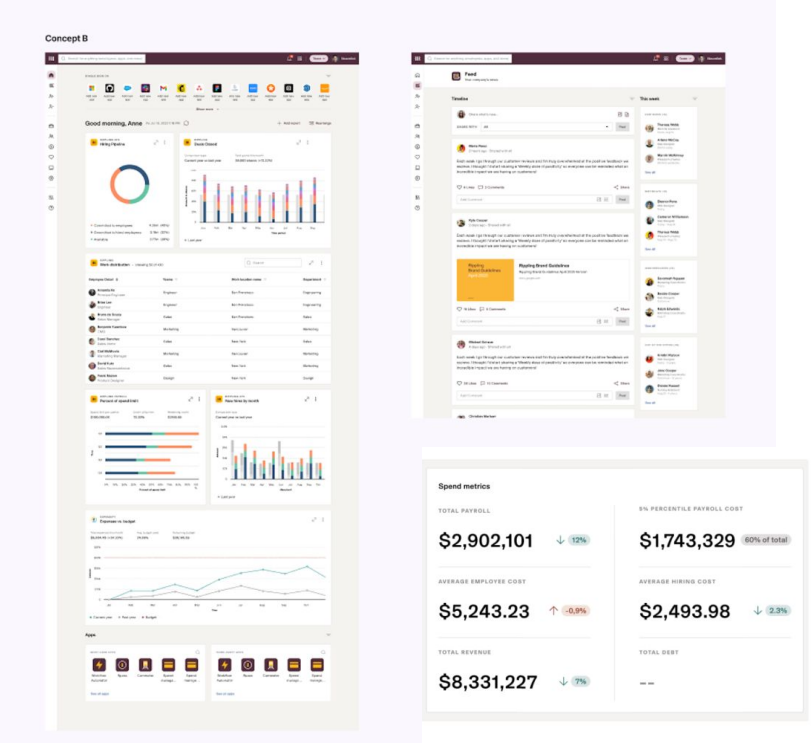
Transforming insights from research into design concepts for testing

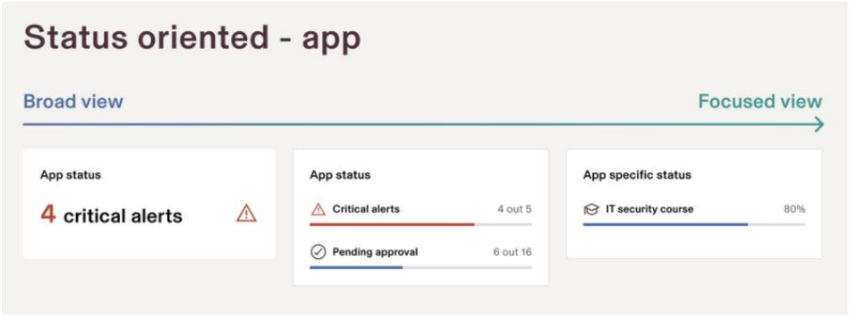
Phase 1: Low fidelity ideation in figjam

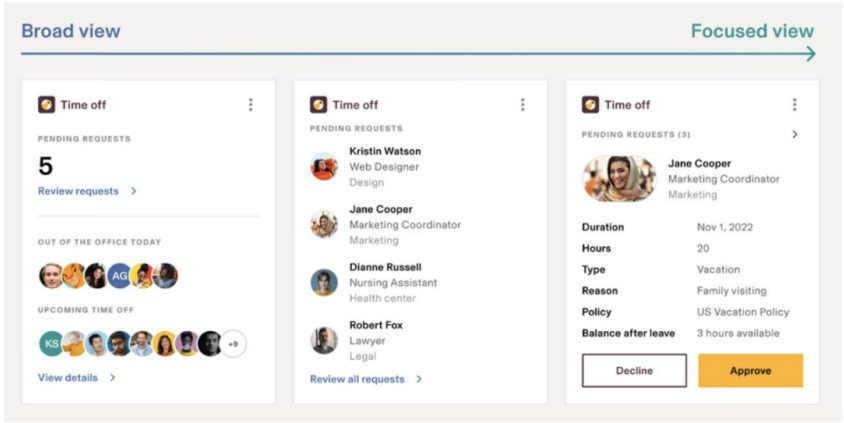


Transforming insights from research into design concepts for testing

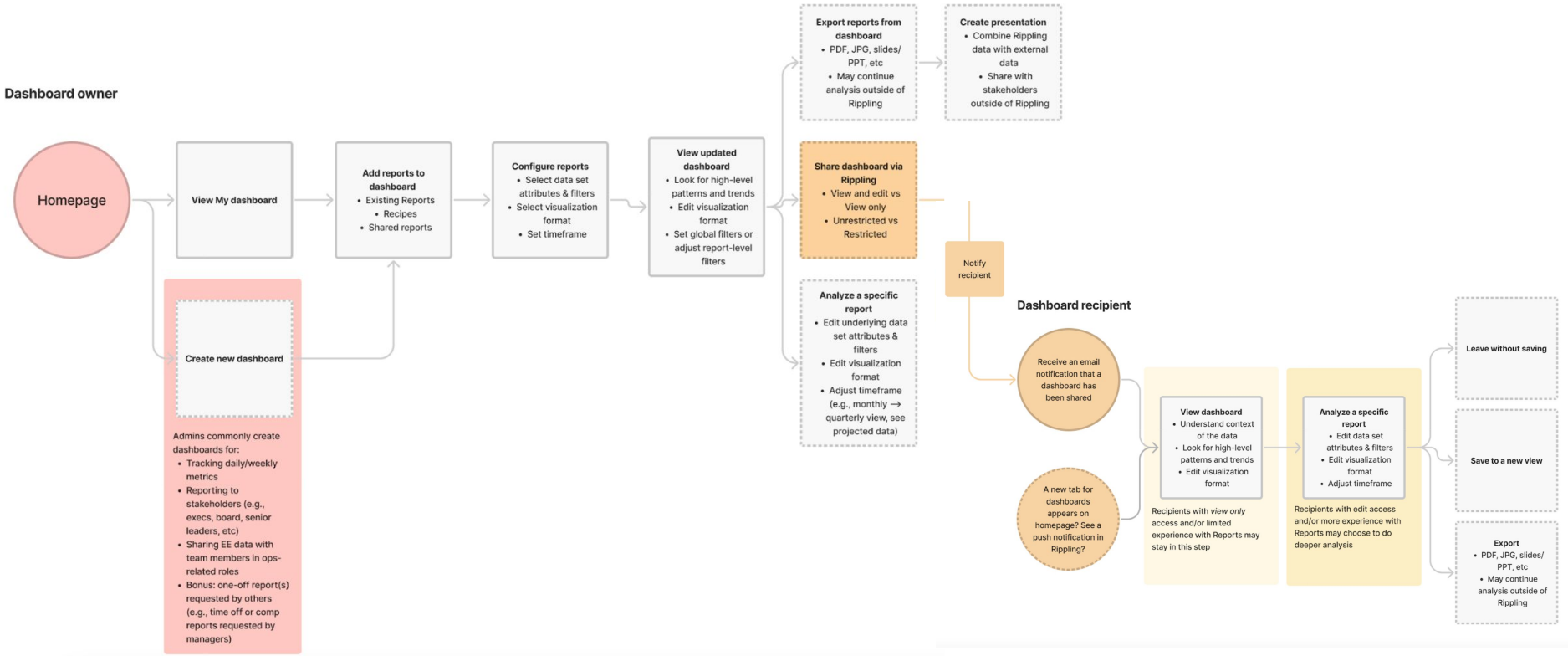
Phase 2: Working sessions with product designer to experiment with a homepage dashboard widget framework







Flows evaluated in usability testing



Conflicting views on the dashboard experience

CEO and PM favored a highly configurable experience

User can have multiple dashboards tabs and unlimited reports on the homepage

Full configuration and customization options available in a settings menu

Configure new reports and drill down in data from the same view

Researcher and Designer favored a progressive disclosure approach

Users can pin a set number of reports to a single homepage dashboard

Change appearance and display settings from the homepage

Go to the Reports app to drill down, configure new reports, create more views

Dashboards beta was launched later in 2022! 🙌

December 6th, 2022

We are launching Home Dashboards for Rippling! 🚀 ✨

Every admin can now easily monitor important metrics from all Rippling apps directly from their homepage. Front and center, in one unified dashboard, they can see what needs their attention, they can drill down into data specifics, and can do quick analysis to glean additional insight.

The homepage is now a launch pad for productivity by bubbling up all the info needed to make better and faster decisions. From one central location, admins can do all of the following:

- HR admins and managers can closely monitor their headcount numbers, see incoming new hires and start dates, stay on top of attrition data, view upcoming time off for their department, and preview Carta equity data
- Finance admins can track spend and compensation changes across departments, can drill down into anomalies that need attention, stay on top of expected upcoming spend per vendor, and can track spend against budget over time
- IT admins can quickly see logins from uncommon places, devices that need upgrades or maintenance, which devices are outside of compliance, and failed logins

Admins have been chomping at the bit to get their hands on this, since this will make it so much easier to monitor all the critical data they need for their jobs, in order to more quickly and efficiently make decisions.

To introduce the power of dashboards, Rippling selected a few default report recipes per app that will be automatically added to the dashboards of the admins who manage that app. From there, every individual user has full customizability of which reports they see, based on what matters most to them.

Check out this video to see this functionality live! Here's a document explaining the core functionality and FAQs.

The best part is: this is all being powered by the Reports app. This means that users can add reports to their dashboard directly from the Reports app, every performance improvement made by the Reports team will benefit dashboards, and every feature enhancement launched from reports will **"ripple"** into dashboards. 🤯 〰

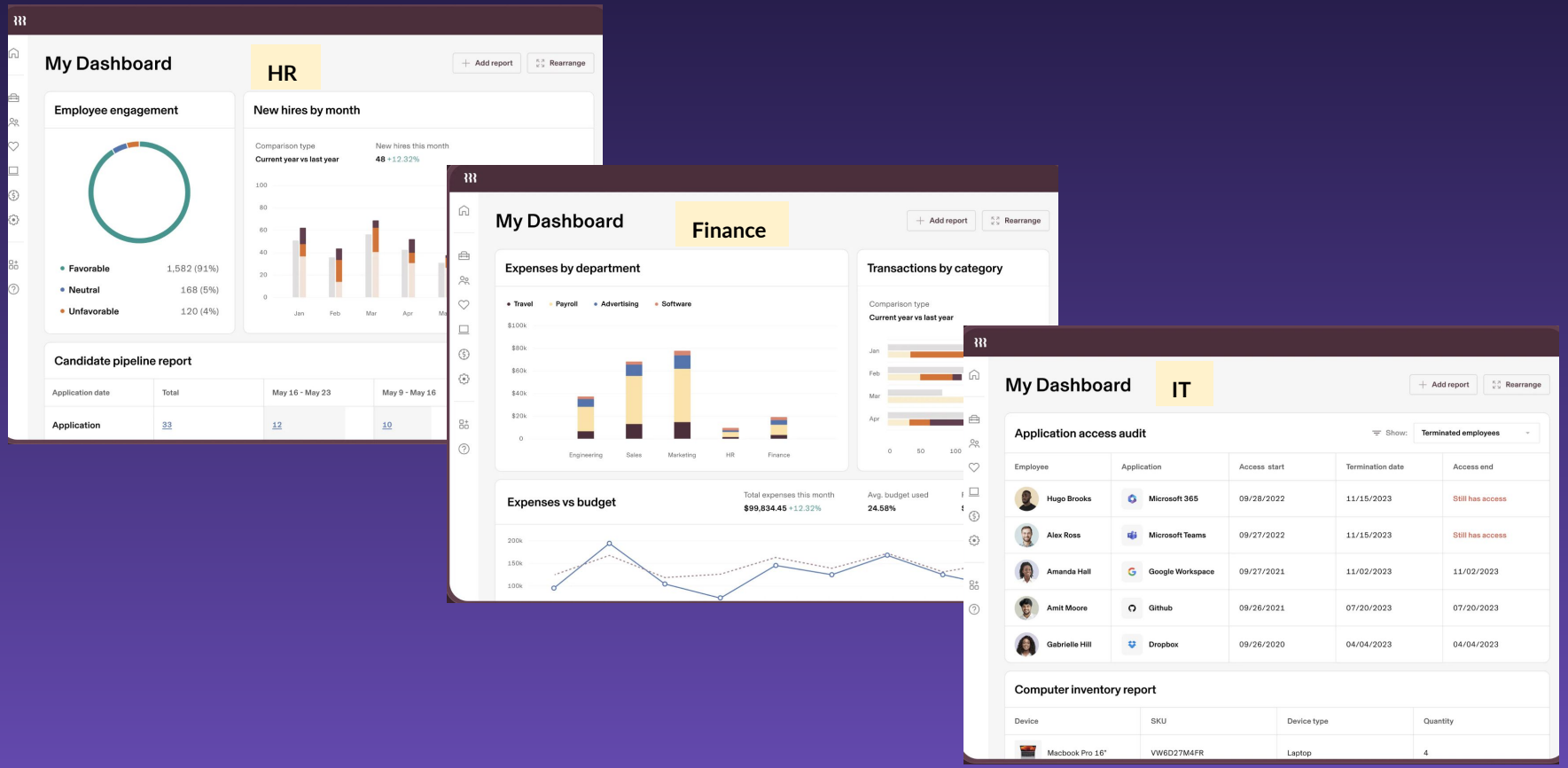
This effort is a culmination of months and months of hard work from multiple engineering teams, especially the Embedded report and Dashboards engineering team:

Huge shout out to the Reports team for launching "backend object loading" and other complex performance enhancements needed to make sure dashboards are performant.
Thank you to who built the actual base drag and drop component used in dashboards rearrangement, we wouldn't have that feature without you.
Huge kudos to who did all the beautiful designs, with help from who started thinking about this last year. Awesome UX Research from @Katherine Okpara who kicked us off in the right direction.

Thank you to the T&A team, HRIS team, App Management team and Spend Management team for preparing default recipes for the initial launch. We will be creating even more recipes before GA, so the default dashboards can be as valuable as possible. Looking forward to all data models finishing their migration to CDR (LMS, Insurance, Documents), so they can all be added to the dashboard.

Rippling dashboards are live now! The customer beta will begin at the beginning of January, and GA is planned for the end of January. Stay tuned! (edited)

Dashboards for all personas are now live in Rippling!



Rippling Dashboards Reflections

Illustration by Storyset

Thank you!

Any questions?