

# 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

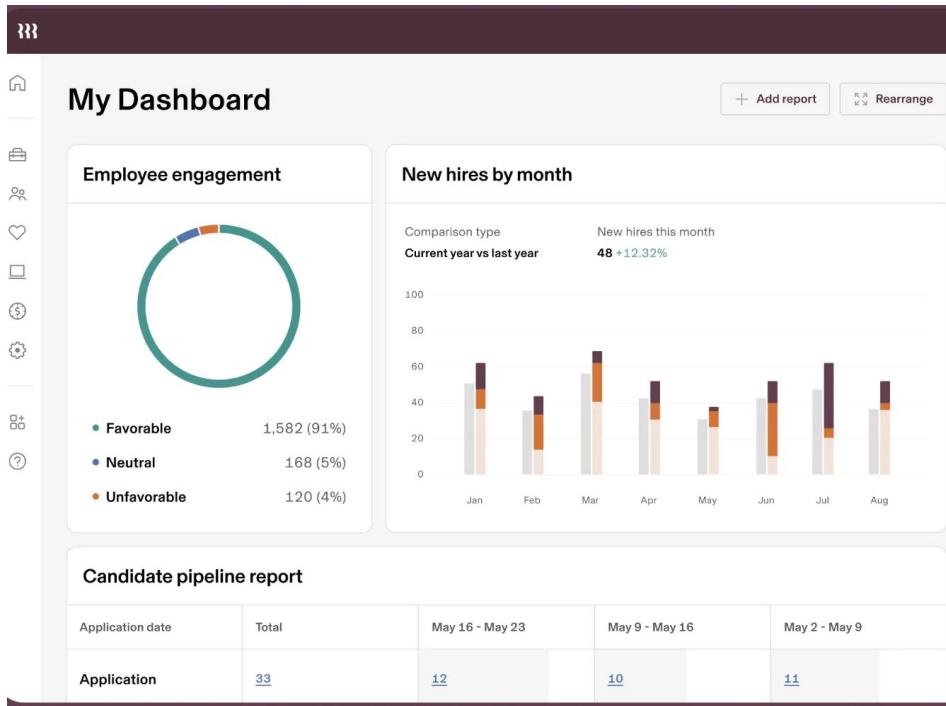




# Case Studies

# Case Study

Unifying workforce analytics  
through dashboards on  
[www.rippling.com](http://www.rippling.com)



# Background: What is Rippling?



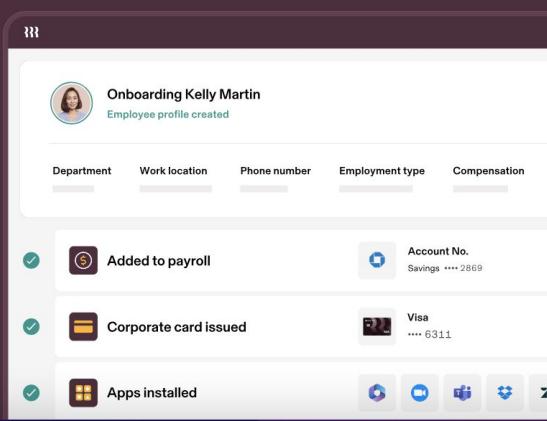
The landing page for Rippling features a grid of 20 isometric icons representing various business processes like payroll, HR, and finance. Below the icons, a large headline reads: **Automate the busy work that limits business impact**. A subtext explains: **Rippling can automate any process across your systems, from simple updates to complex workflows. That reduces human error and gives everyone more time to focus on strategic work.**

**Automate employee lifecycle events**

Automate all the tasks associated with onboarding, promotions, and offboarding, based on rules you set.

Keep every system in sync

Build any automation without code



A screenshot of the Rippling mobile application interface. The top bar shows the title **Onboarding Kelly Martin** and the subtext **Employee profile created**. Below this, there are tabs for **Department**, **Work location**, **Phone number**, **Employment type**, and **Compensation**. The main content area displays three automation tasks with checkmarks: **Added to payroll** (with a savings account icon and ID 2869), **Corporate card issued** (with a Visa card icon and ID 6311), and **Apps installed** (with a grid of app icons).

# 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

<b>Identify and respond to business, system, and employee issues</b>	<ul style="list-style-type: none"><li>• Dig into a specific problem that popped up</li><li>• Look up data to resolve and issue on behalf of an employee</li><li>• Respond to requests</li></ul>
<b>Analyze business, system, and employee data</b>	<ul style="list-style-type: none"><li>• Understand key business questions stakeholders have</li><li>• Gather data across tools and systems</li><li>• Analyze data by dimensions such as department, location, level, DEI, etc</li></ul>
<b>Curate, share, and present data to stakeholders</b>	<ul style="list-style-type: none"><li>• Organize data into a format that is easy to consume</li><li>• Determine the appropriate level or access to give to different stakeholders</li><li>• Share data with stakeholders at a regular cadence</li></ul>
<b>Stay in compliance</b>	<ul style="list-style-type: none"><li>• Ensure that employees are following company protocols/guidelines</li><li>• Run compliance-related reports</li><li>• [When required] Submit records to 3rd party compliance orgs</li></ul>

# 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.

“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”

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

## 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

### Modes

Proactive data analysis

Reactive data interaction

Passive data consumption

### Cadences

**Daily:** checking stats, responding to requests, monitoring trends

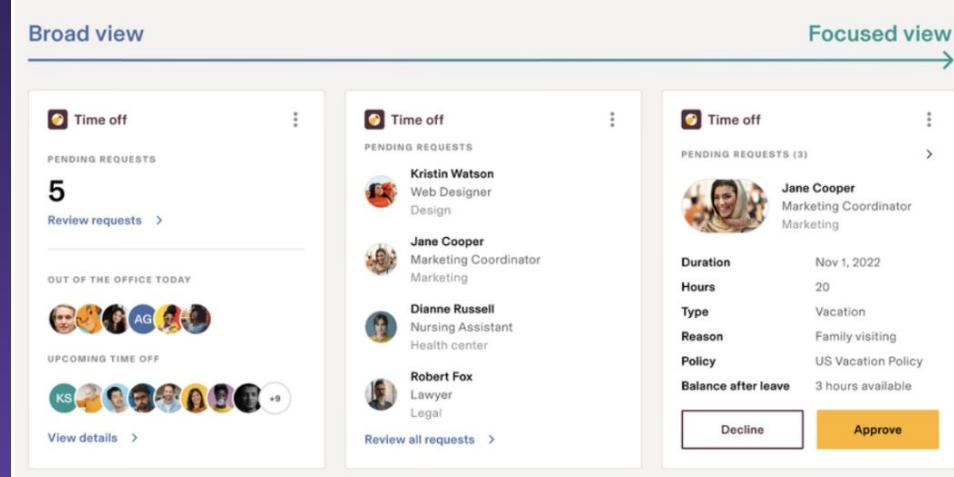
**Weekly/Monthly/Quarterly:** comparing trends over time, running reports, diagnosing problems

**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

## 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's 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



**Broad view**

**PENDING REQUESTS**

5

[Review requests](#)

**OUT OF THE OFFICE TODAY**

**UPCOMING TIME OFF**

[View details](#)

**Focused view**

**PENDING REQUESTS**

**Kristin Watson**  
Web Designer  
Design

**Jane Cooper**  
Marketing Coordinator  
Marketing

**Dianne Russell**  
Nursing Assistant  
Health center

**Robert Fox**  
Lawyer  
Legal

**Jane Cooper**  
Marketing Coordinator  
Marketing

**Duration** Nov 1, 2022  
**Hours** 20  
**Type** Vacation  
**Reason** Family visiting  
**Policy** US Vacation Policy  
**Balance after leave** 3 hours available

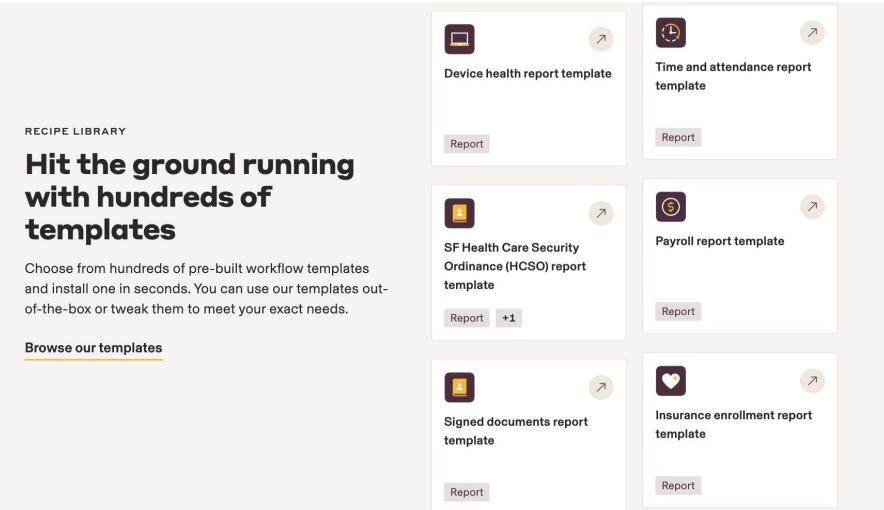
[Decline](#) [Approve](#)

**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



**RECIPE LIBRARY**

### Hit the ground running with hundreds of templates

Choose from hundreds of pre-built workflow templates and install one in seconds. You can use our templates out-of-the-box or tweak them to meet your exact needs.

[Browse our templates](#)

- Device health report template**
- Time and attendance report template**
- SF Health Care Security Ordinance (HCSO) report template**
- Payroll report template**
- Signed documents report template**
- Insurance enrollment report template**

**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.”

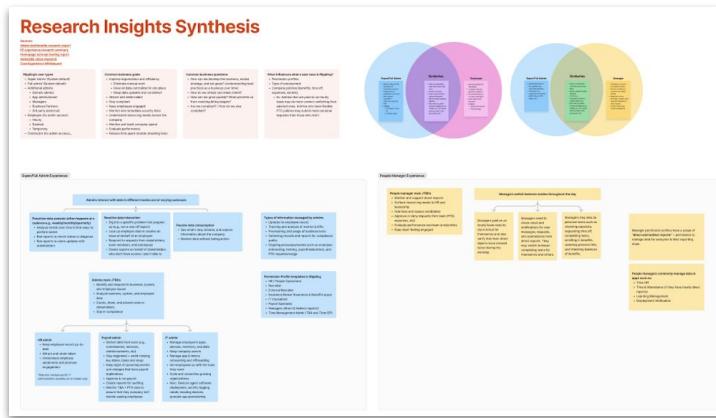
- Director of Finance



**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.		
Research Insight	Recommendation(s)	Product/Design Decision
Admins interact with data in different modes and at varying cadences	<ul style="list-style-type: none"><li>(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</li></ul>	<p>Concepts of Home, Reports, and Dashboards</p> <p>Home dashboard surfaces key metrics as an overview of data while Reports Dashboard enables drill down and more complex configuration</p> <ul style="list-style-type: none"><li>All users are given a "My Dashboard" view that is predefined by Reporting based on their role, company size, and app used.</li></ul>
Admins want to easily extract insights from Ripping data	<ul style="list-style-type: none"><li>(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</li></ul>	<ul style="list-style-type: none"><li>Introduction of Big Number Charts</li></ul>
Admins feel anxious when sharing data due to uncertainty around permissions	<ul style="list-style-type: none"><li>(1) Help users easily verify the data that will be shared with recipients before submitting (2) Make "restrict" the default, recommended sharing option (3) Provide a warning when users choose dashboard settings that will override permissions</li></ul>	<p>By default all requests have only limited data access rights. Users can change permissions and data access by clicking the settings icon.</p> <p>Show an alert when destructive changes are being made</p>
Dashboard owners don't want recipients to override their configurations	<ul style="list-style-type: none"><li>(1) Request recipients to share 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 all linked dashboards</li></ul>	
Admins struggle to understand the scope of "configuring a report"	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

<b>01</b>	<b>Create smart defaults and allow customization</b>	<ul style="list-style-type: none"><li>• Design for the majority of common use cases while giving the user flexibility to tailor the experience to what is most important to them</li></ul>
<b>02</b>	<b>Help users figure out what is highest priority for their day</b>	<ul style="list-style-type: none"><li>• Surface directly relevant, urgent, or time-sensitive content</li><li>• Promotional or non-urgent nudges/alerts should be transient and not in center of the homepage</li></ul>
<b>03</b>	<b>Help users easily process information</b>	<ul style="list-style-type: none"><li>• Provide users with a cohesive overview of the system</li><li>• Balance various types of data and information to give a holistic report on what's new in the system</li></ul>
<b>04</b>	<b>Avoid excessive content and overly complex interactions</b>	<ul style="list-style-type: none"><li>• The homepage should provide information at a glance and save users time on key tasks</li><li>• Consider performance and load times when adding visualizations to the homepage</li></ul>

# Transforming insights from research into design concepts for testing

## Phase 1: Low fidelity ideation in figjam

**Design ideation station**  
Homepage concepts for different participants

**PF - Payroll Admin (orange, 40x40)**

- Tasks
  - Approvals
- Birthdays & anniversaries
- Reports (owned by accounting team)
  - Payroll journal report
- Open job postings
  - Applications
  - Job board integrations
- E-verify status widget

**PF - HRIS Admin (yellow, 40x40)**

- Tasks
- Company calendar
  - Events
  - Celebrations
- Status of deductions
- Status of EE onboarding
  - EEs with outstanding onboarding tasks
- Status of course trainings
- Reports
  - payroll journal report
- People Overview
  - Demographics
  - EE registrations

**PF - HR Ops Manager (green, 40x40)**

- Tasks
  - Upcoming payroll reminders
  - Approve payroll
- My apps
- Reports
  - Hirecount trends report
  - Hiring pipeline
  - Benefits
- course trainings
- Reminders

**PF - Payroll Manager (blue, 40x40)**

- Tasks
  - My tasks | Tasks I've Assigned
- Policies needing your attention
- Reports
  - Most used reports (created by me) at top
  - Additional reports (created by me) at bottom

**PF - Admin of HR Manager (purple, 40x40)**

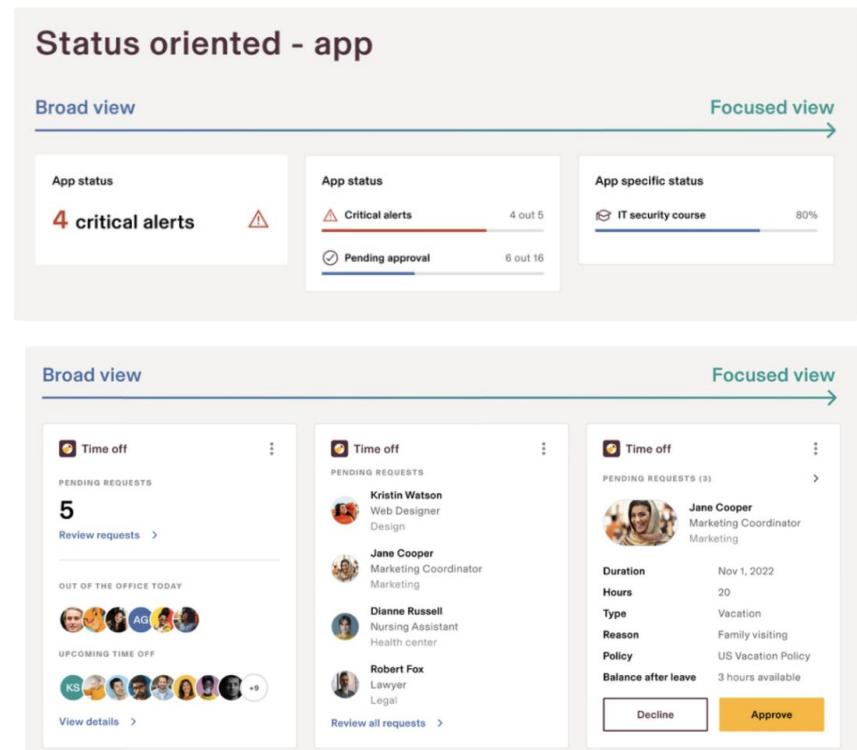
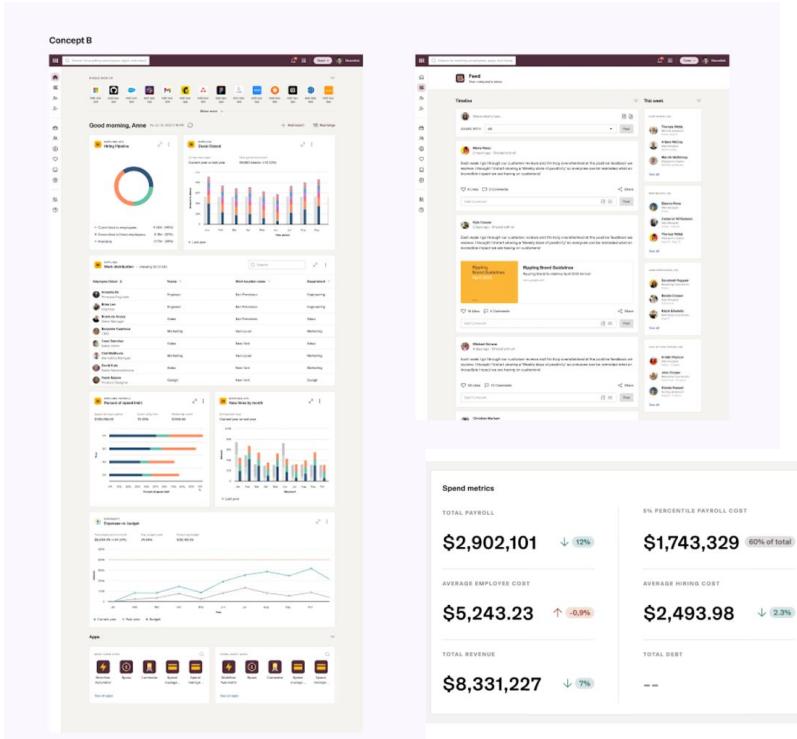
- Tasks
  - My tasks | Tasks I've Assigned
- EE onboarding progress / checklist
- Apps
- Reminders
- Monthly medical reconciliations (only type of reports ran by PMS)

**PF - Admin of People Ops (pink, 40x40)**

- Tasks
- Big Number Charts
  - Total headcount
  - Turnover snapshot (monthly)
- Reports (preference for visualizations)
  - Turnover breakdown by dept / location / tenure / levels
  - Total compensation
- Shortcut to company intranet?

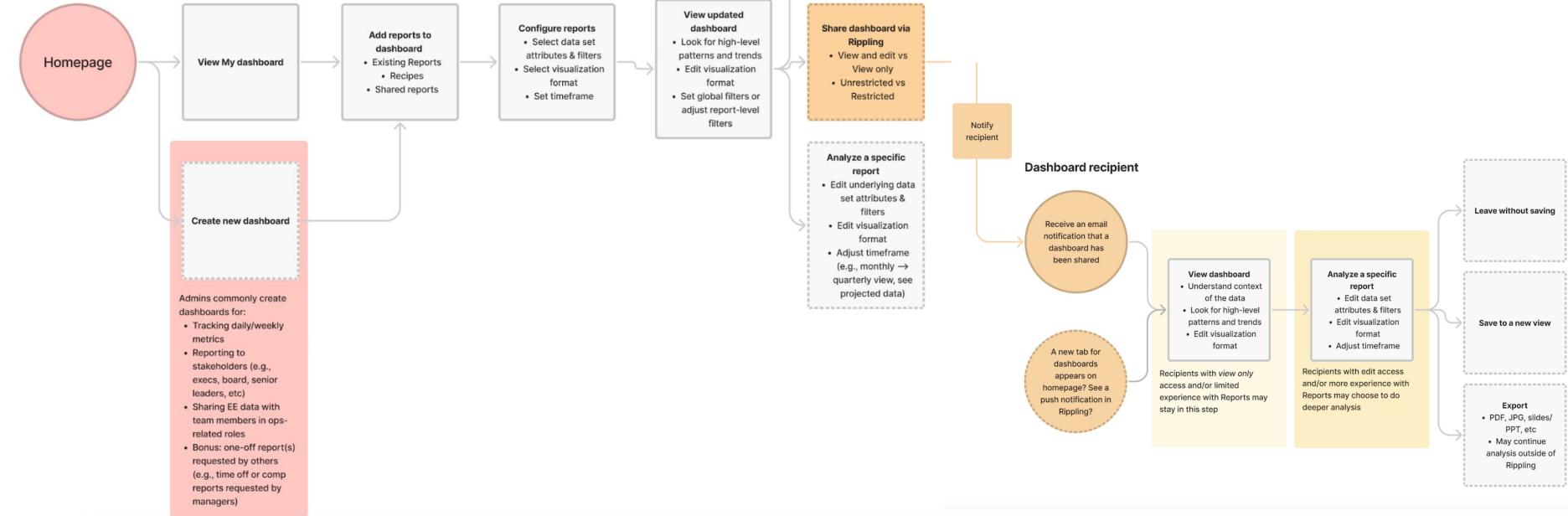
# Transforming insights from research into design concepts for testing

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



# Flows evaluated in usability testing

Dashboard owner



# 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! 🙌



We are launching Home Dashboards for Rippling! 🚀✨

December 6th, 2022 ▾

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 [redacted] who built the actual base drag and drop component used in dashboards rearrangement, we wouldn't have that feature without you.

Huge kudos to [redacted] who did all the beautiful designs, with help from [redacted] 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!

## My Dashboard

### Employee engagement

Category	Count	Percentage
Favorable	1,582	91%
Neutral	168	5%
Unfavorable	120	4%

### Candidate pipeline report

Application date	Total	May 16 - May 23	May 9 - May 16
Application	33	12	10

**HR**

### New hires by month

Comparison type: Current year vs last year

New hires this month: 48 +12.32%

Month	New hires
Jan	50
Feb	45
Mar	60
Apr	50
May	40

## My Dashboard

### Expenses by department

Department	Travel	Payroll	Advertising	Software	Total
Engineering	10k	15k	5k	5k	35k
Sales	20k	30k	10k	5k	65k
Marketing	15k	20k	10k	5k	50k
HR	5k	5k	5k	5k	20k
Finance	5k	5k	5k	5k	20k

### Transactions by category

Comparison type: Current year vs last year

Category	Jan	Feb	Mar	Apr
Category A	80	90	100	90
Category B	20	10	10	10

**Finance**

## My Dashboard

### Expenses vs budget

Total expenses this month: \$99,834.45 +12.32%

Avg. budget used: 24.58%

Month	Actual Expenses	Budget
Jan	120k	100k
Feb	150k	130k
Mar	100k	80k
Apr	140k	110k
May	130k	100k

## My Dashboard

### Application access audit

Show: Terminated employees

Employee	Application	Access start	Termination date	Access end
Hugo Brooks	Microsoft 365	09/28/2022	11/15/2023	Still has access
Alex Ross	Microsoft Teams	09/27/2022	11/15/2023	Still has access
Amanda Hall	Google Workspace	09/27/2021	11/02/2023	11/02/2023
Amit Moore	Github	09/26/2021	07/20/2023	07/20/2023
Gabrielle Hill	Dropbox	09/26/2020	04/04/2023	04/04/2023

### Computer inventory report

Device	SKU	Device type	Quantity
Macbook Pro 16"	VW8D27M4FR	Laptop	4

**IT**



# Rippling Dashboards Reflections

*Illustration by Storyset*

**Thank you!**  
Any questions?