UX PILOT PROJECT

Use this worksheet to identify one role and design a small UX pilot that improves how Workday works for real people.

1 Start with the People

Choose one role to design for. Things to consider:

- ☐ Select a role that plays a key part in day-to-day operations
- ☐ Choose a group that would benefit from stronger adoption
- ☐ Consider decentralized roles (e.g., admin assistants, dept. chairs, faculty)
- ☐ Balance specificity (clear needs) with sustainability (manageable to maintain)

→ The more specific the role, the clearer the dashboard. Just don't make it so narrow that it becomes hard to maintain.

2 Identify Their Real Needs

Design around real work, not system features. Things to consider:

- ☐ What decisions does this role make daily or weekly?
- ☐ What tasks do they complete in Workday?
- ☐ What information do they need most often?
- ☐ Where do they experience frustration or delays?
- ☐ What do they search for repeatedly?

→ Talk to the people in the role. Ask what's hard. Ask what they wish was easier.

3 Gather the Right Tools

Consolidate what they already use and what they struggle to find. Try this:

- ☐ Identify key reports they rely on
- ☐ Build or refine reports if needed
- ☐ Surface frequently used tasks
- ☐ Include job aids or guidance they access regularly

→ If users are repeatedly searching for something, it belongs on their dashboard.

4 Build the Dashboard

Bring it all together into one intentional, role-based view.

- ☐ Create a new role-based dashboard
- ☐ Add worklets aligned to real responsibilities
- ☐ Include announcements or timely information
- ☐ Add the dashboard to global navigation
- ☐ Test with real users and refine

→ Strong user experience isn't accidental. It's designed.

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