

# Paycor Case Study

## Enterprise 2.0

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### Agenda

1. Project Overview
2. The Challenge
3. Research Objectives
4. Research Questions
5. Research Approach
6. Key Metrics at a Glance
7. Survey Highlights
8. Key Findings
9. Quantitative Results
10. Recommendations
11. Impact
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## What is Paycor?

- Payroll and human resources platform
- Supports payroll processing, employee management, deductions, benefits, and PTO

## Role

- Senior UX Designer & Researcher

## Timeline

- January, March, and June 2012

## Team

- Product Owner
- Business Analyst Leads
- Software Developers
- UX Design
- UX Research



### **Study Goals**

- Evaluate critical payroll workflows
- Measure task success and efficiency
- Identify workflow breakdowns and usability issues
- Understand where users struggled during task completion
- Provide recommendations prior to release

### **Existing Payroll Application**

- Critical Payroll Workflows
- Discoverability and Workflow Concerns

### **Critical Payroll Workflows**

- Payroll tasks directly impacted employee pay and business operations
- Errors or delays could affect payroll processing and reporting
- Users needed to complete tasks quickly and with confidence

### **Discoverability and Workflow Concerns**

- Concerns about workflow complexity
- Concerns about feature discoverability
- Concerns about navigation and locating critical functionality
- Concerns about whether the application supported users' expectations and mental models



### **Need to Understand Where Users Struggled**

- Identify workflow breakdowns
- Understand where users experienced confusion or hesitation
- Uncover usability issues impacting task completion and efficiency
- Provide recommendations to improve the user experience before release



### **Evaluate Effectiveness**

- Assess users' ability to successfully complete critical payroll tasks
- Identify workflows with low task success rates

### **Evaluate Efficiency**

- Measure time on task
- Identify workflows that required excessive effort or multiple attempts

### **Identify Usability Issues**

- Identify workflow breakdowns
- Identify navigation, discoverability, and interaction issues
- Document observed user difficulties and pain points

### **Measure Satisfaction**

- Collect post-test survey feedback
- Understand user perceptions of ease of use, learnability, and overall satisfaction

- Can users successfully complete key payroll, employee management, and payroll processing tasks?
- Are navigation, workflows, and task paths intuitive and easy to understand?
- Are important controls, actions, and system functionality easily discoverable?
- Do users understand payroll terminology, labels, system feedback, and status indicators?
- Can users locate required payroll functions and employee information efficiently?
- Can users successfully manage pay data, deductions, manual checks, payroll configuration, and payrun review tasks?
- Are grid-based interactions and column management features discoverable and easy to use?
- What usability issues create errors, confusion, inefficiencies, or workflow breakdowns?



### **Moderated Testing**

- Task-based usability testing
- Participants completed realistic payroll and employee management scenarios

### **Metrics Collected**

- Task success
- Time on task
- Observed issues
- Post-test surveys (January and March)

### **Total Participants**

- 26 participants
- Payroll and HR system users

### **Number of Studies**

- 3 usability studies

### **Tasks Evaluated**

- Payroll processing
- Employee management
- Deductions
- PTO workflows
- Payrun activities

### **Overall Success Rates**

- Task success rates ranged from 13% to 100%
- Several critical payroll workflows produced low success rates
- Some users were unable to complete assigned tasks
- Users frequently required assistance, multiple attempts, or trial-and-error behavior
- Long completion times indicated significant workflow friction



## Survey Highlights

- Survey ratings were generally positive
- User behavior revealed substantially more difficulty than survey responses suggested
- Observed usability issues included hidden functionality, navigation confusion, scrolling challenges, and workflow breakdowns
- Behavioral data provided a more complete picture of the user experience than survey ratings alone

### **Discoverability Issues**

- Users struggled to locate important functionality
- Key actions and controls were often overlooked
- Hidden features reduced task efficiency and increased user frustration

### **Navigation Confusion**

- Users were often unsure where tasks should be completed
- Navigation did not consistently match user expectations
- Users frequently explored multiple areas before finding the correct workflow

### **Discoverability and Visibility Issues**

- Critical controls and information were not immediately visible
- Users frequently missed columns, actions, and workflow options
- Hidden functionality contributed to task failures and longer completion times

### **Workflow Breakdowns**

- Several payroll workflows produced low success rates
- Users relied on trial-and-error behavior to complete tasks
- Some users were unable to complete assigned tasks without assistance

### **Feedback and Visibility Issues**

- Users had difficulty identifying system status and workflow progress
- Important information was not always visible when needed
- Error and validation feedback was not consistently noticeable to users



### Accessibility Issues

- Users frequently overlooked color-based field indicators and validation states
- In one usability task, all 10 participants failed because they could not identify the color-based field outlines
- Accessibility concerns were communicated to the product team prior to testing
- The findings validated the risk of relying on color alone to communicate important information

### **Task Success Rates**

- **Success rates ranged from 13% to 100% across tested workflows**
- **Multiple critical payroll tasks achieved less than 50% success**
- Some users were unable to complete assigned tasks
- Task failures were often linked to discoverability, navigation, and workflow issues

### **Time on Task**

- Completion times varied significantly across workflows
- Several tasks required extended completion times
- Long task times frequently reflected user confusion, repeated attempts, and difficulty locating functionality

## **Survey Results**

- January and March survey ratings were generally positive
- Users reported satisfaction with the application despite experiencing usability issues during testing
- Survey responses did not always align with observed user behavior

## **Key Quantitative Insight**

- Behavioral measures (task success and time on task) revealed usability issues that were not fully reflected in post-test survey ratings



### **Improve Discoverability**

- Increase visibility of critical controls and actions
- Reduce reliance on hidden functionality
- Make frequently used features easier to locate

### **Simplify Workflows**

- Reduce unnecessary steps and complexity
- Better align workflows with user expectations
- Streamline common payroll tasks

### **Improve Navigation and Information Architecture**

- Clarify where tasks should be completed
- Improve organization of information and functionality
- Reduce user uncertainty during task completion

**Improve Visibility and Feedback**

- Make system status, progress, and results more apparent
- Improve visibility of important information and actions
- Strengthen error and validation feedback

**Address Accessibility Issues**

- Eliminate reliance on color alone to communicate information
- Provide additional visual indicators for errors and required fields
- Improve accessibility for users with visual impairments and color vision deficiencies

**Continue Iterative Usability Testing**

- Conduct usability testing throughout the design and development process
- Validate that identified issues have been resolved
- Evaluate the impact of design changes on task success, efficiency, and user satisfaction
- Identify emerging usability issues before release



- Identified critical usability issues prior to release
- Revealed consistent patterns of user confusion across payroll workflows
- Provided evidence-based recommendations to guide design decisions
- Highlighted accessibility risks that prevented task completion
- Established baseline usability metrics across key payroll workflows
- Demonstrated the value of combining behavioral and survey data
- **Created a foundation for future usability benchmarking and iterative improvement**



- User satisfaction ratings do not always reflect actual task performance
- Behavioral observation is critical for identifying workflow breakdowns
- Hidden functionality and poor visibility can significantly impact task success
- Accessibility issues can create complete barriers to task completion

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