

# Equus Software Employee Experience



Global Mobility Connected.

A progressive web app  
Fortune 500 Enterprise SAAS platform.

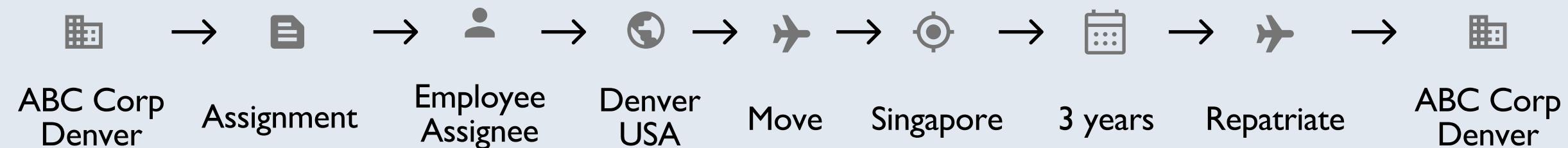
First UX designer

Joel Heaton

Presentation

Project timeline 2016-2018

# Global Mobility & Assignment Lifecycle

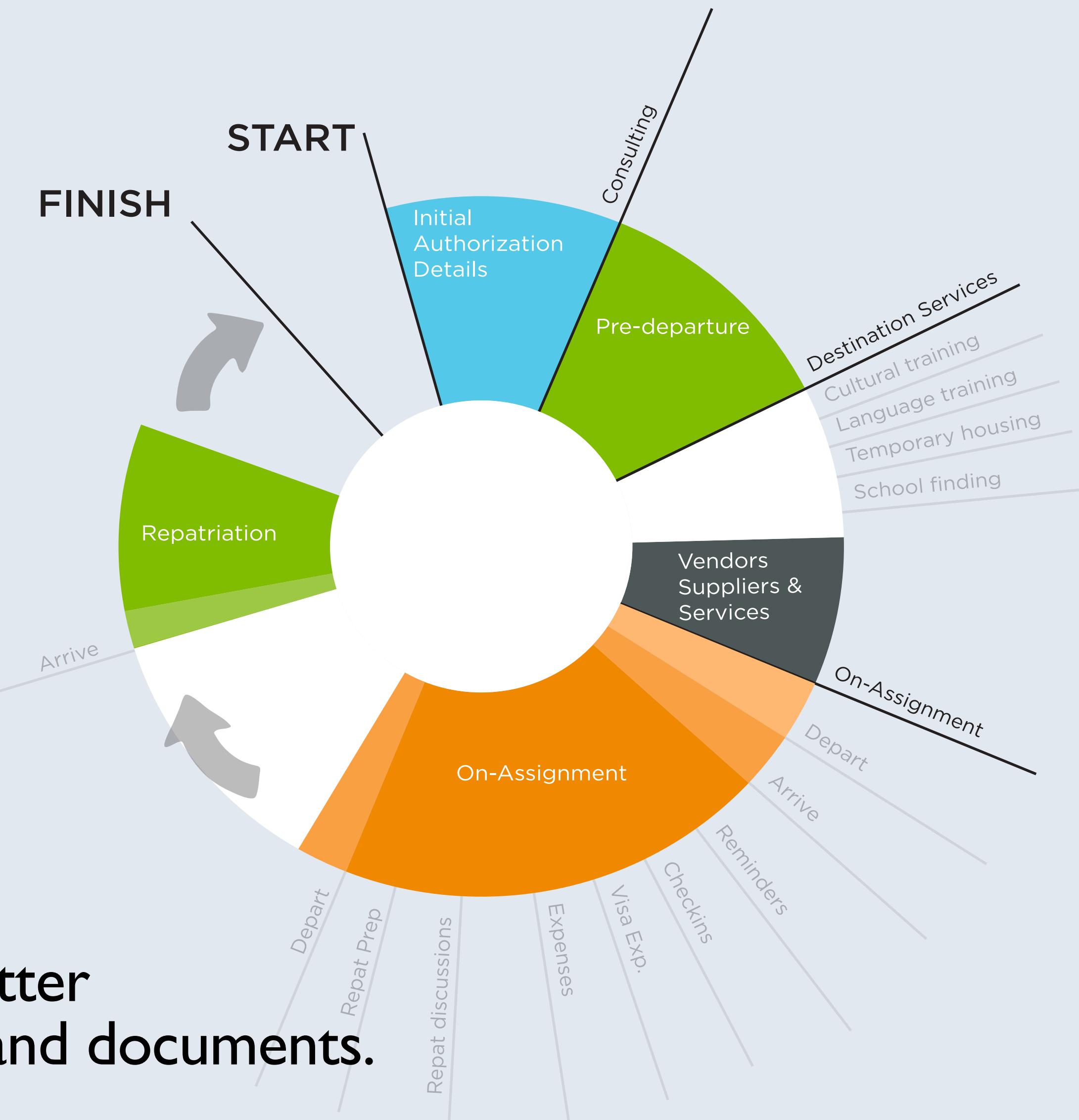


## Problems

The relocation and assignment experience was **stressful, time consuming, and rigorous.**

Scattered **communications** from different teams (moving, immigration, taxes, HR, the job) “chaos!”

Need for an **“anxiety-free experience”** with better task management and visibility into benefits, policies, and documents.



## Goal

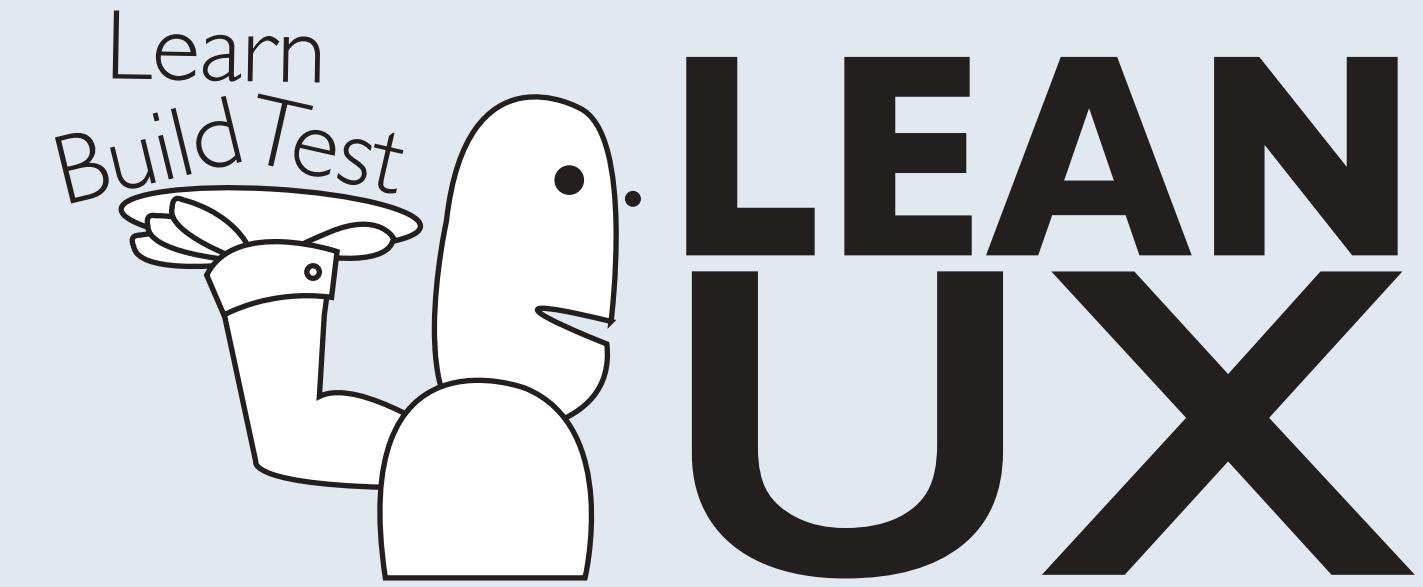
To create an Employee Experience that is elegant, comprehensive and gets the employee relocated, functioning and anxiety free.

### Assignee 3 - Canada

“Scattered teams contacted me for moving. Another for immigration, another for taxes. Centralize all the different activities. It was really scattered. It was a sea of different emails. There was no priority.”

# User Research & Methodology # 1

## 30 day UX Discovery



**Identified Users:** Primary users included Assignees/Employees and others from ecosystem.

**Conducted Interviews:** Conducted 8 stakeholder and 13 user interviews.

**Built insightful artifacts:** Personas, Journey maps and Card sorting

**Key Learnings:** Users wanted tasks presented in a structured, progressive manner to reduce cognitive overload and preferred tracking tasks in a list format over a calendar.

**Guiding Principle:** Progressive disclosure



# User Research & Methodology #2

## Design Sprint



Repeated the Sprint Design format 1 per month for features, products and enhancements.

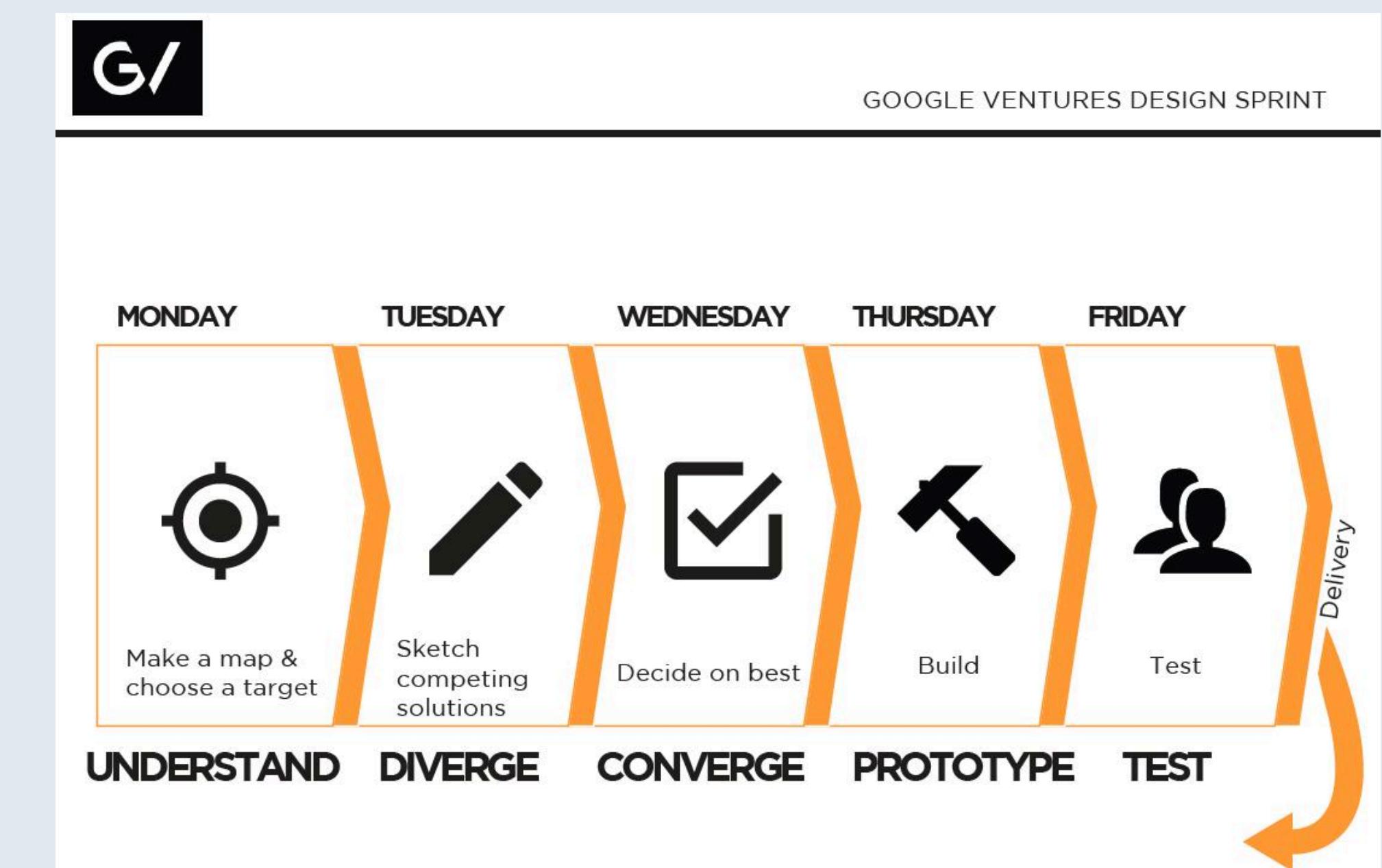
**Day 1:** Define/describe

**Day 2:** Discover

**Day 3:** Invent

**Day 4:** Build

**Day 5:** Test



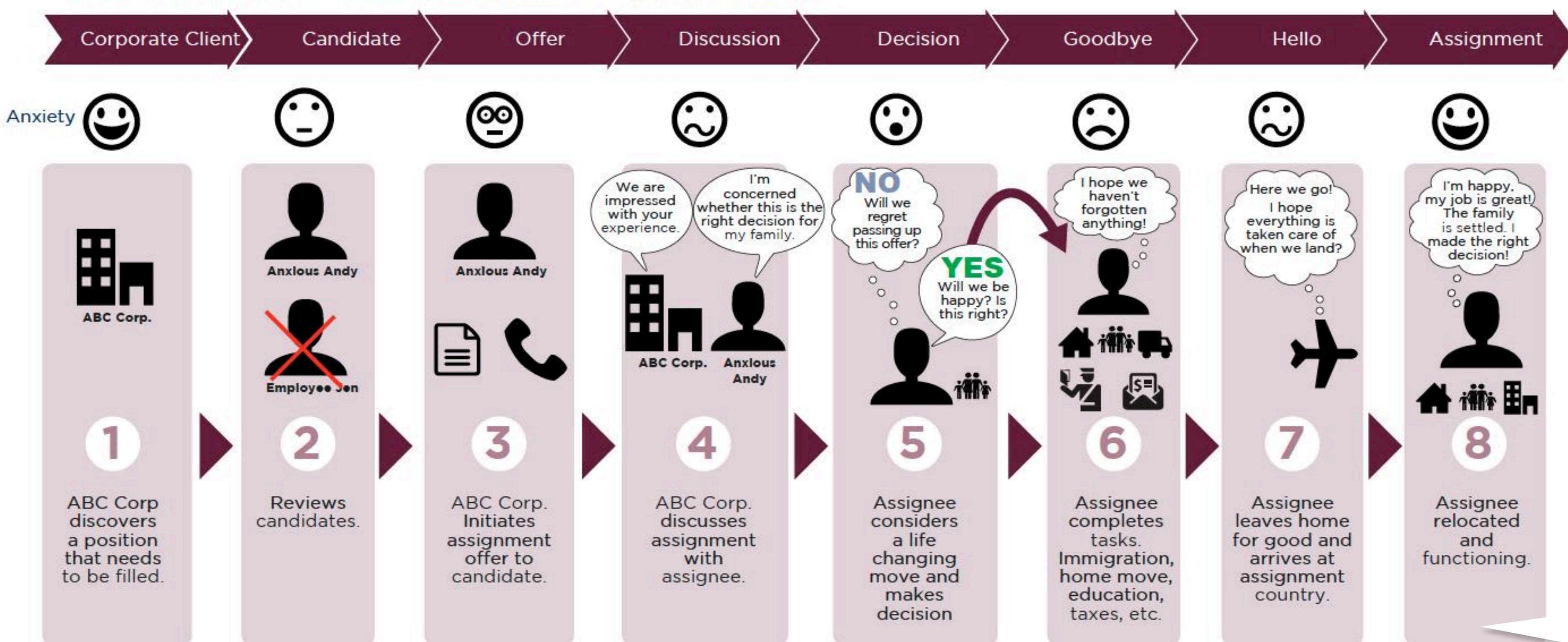




## ASSIGNEE Anxious Andy

TECH SAVVY, EXPERIENCED CHARISMATIC COMPASSIONATE DIRECTOR OF OPERATIONS

### ASSIGNMENT PHASES (based on human emotions)



By mapping the user's emotional journey during the first 30 days, we identified the need for **progressive disclosure**, ensuring the interface evolved alongside the user's growing confidence.

## Process and Solution

**Timeline:** To minimize cognitive overload, we implemented a strategic timeline that serves as a visual anchor for the user. This tool keeps them focused on immediate tasks, provides clear visibility into required documentation, and maps out a transparent path toward completion.

### Assignee 2 - London

“If I could have used a master checklist of everything needed so I would have known to follow up when things fell through.”

## Timeline

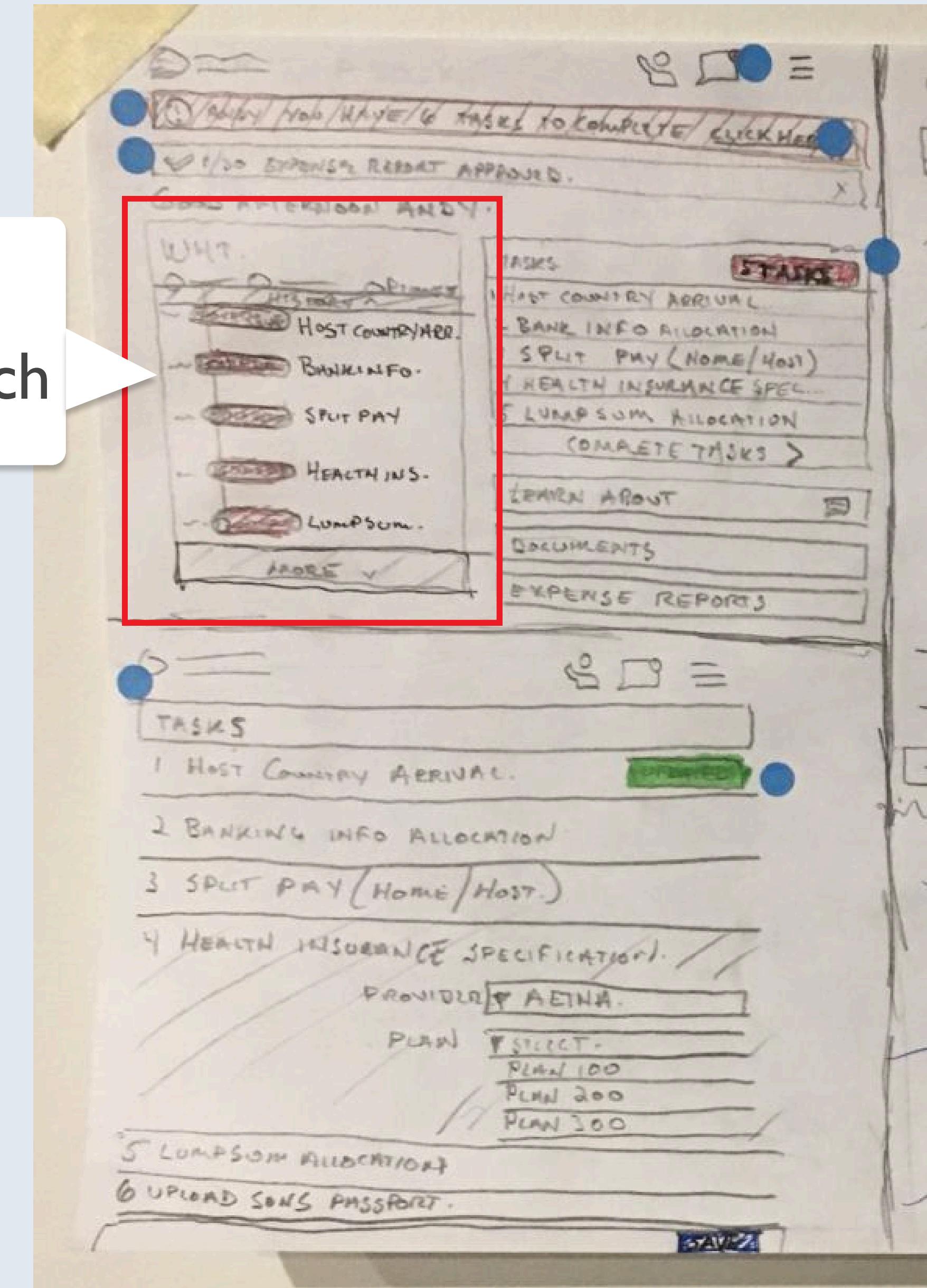
Once the assignment has been accepted its “go time”.

There's a start and end date.

Requested by users and stakeholders.

Items indicate- due, overdue, completed, etc.

Design Sprint sketch



# Timeline iterations

What's Happening

Options ▾

Tasks Events Show All >

All Tasks & Events

Show Past Tasks & Events

Oct 13 Depart Canada

2017

Feb 8 Task Call Luke and Inform him of his True parental lineage becaues it is super important that he finds out given that he is training to become a jedi and his father is Darth Vader; the evil sith  
Inform Luke Skywalker of his true parental lineage.

Feb 21 Task Another Vendor Task  
Description

Feb 22 Task Admin Created Employee Task  
A task created by an Admin

Overdue Tasks

Feb 23 Overdue Task Vendor Created Employee Task  
A task created by a vendor

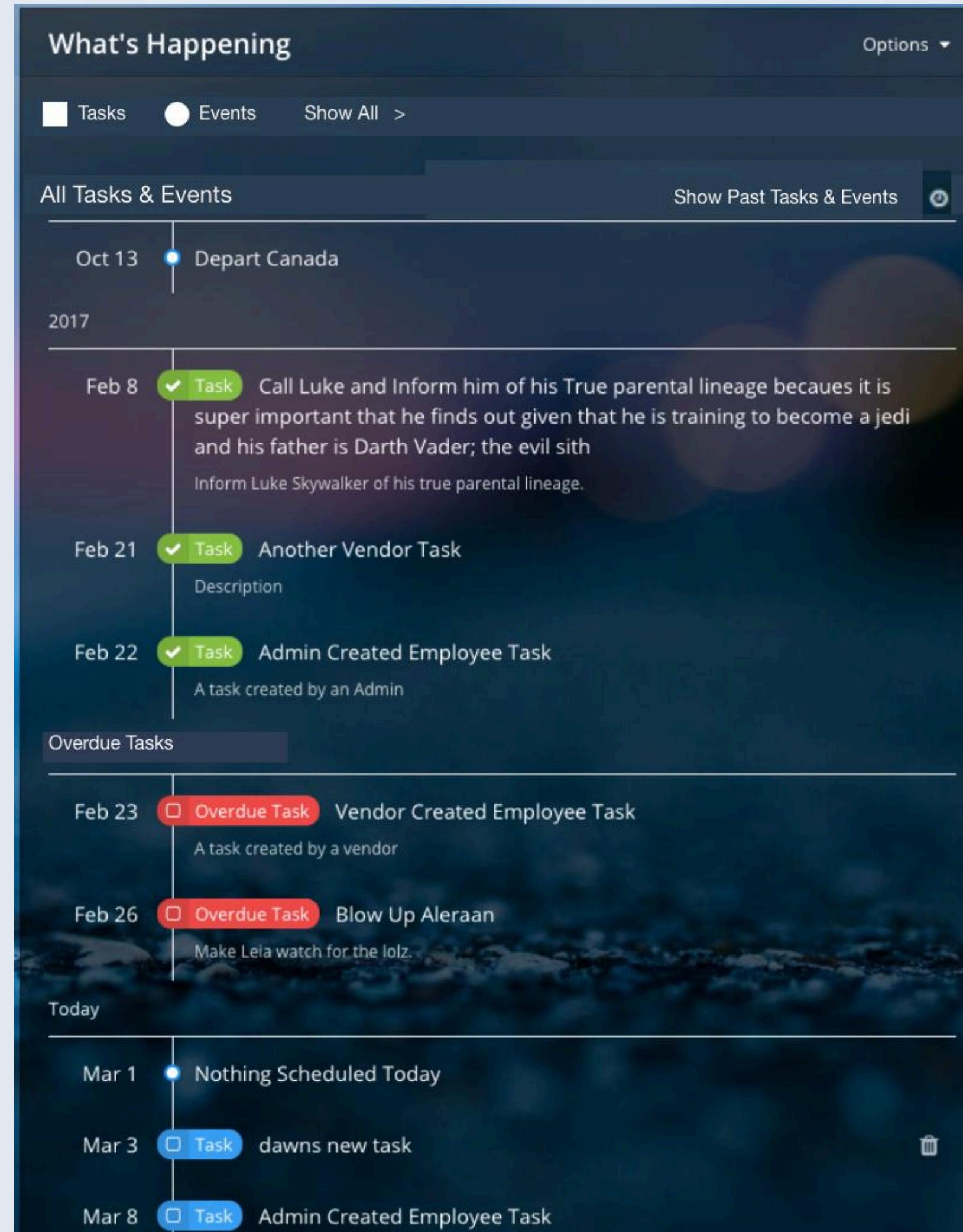
Feb 26 Overdue Task Blow Up Aleraan  
Make Leia watch for the lolz.

Today

Mar 1 Nothing Scheduled Today

Mar 3 Task dawns new task

Mar 8 Task Admin Created Employee Task



Good Morning Jane

What's Happening

Options ▾

+ Add a Task

✓ Show Events & Tasks

Subscribe To Calendar

Overdue Items

Feb 15 Overdue Task Review initiation request  
Review all documents for appropriate approvals. Confirm assignment Agreement received and executed by employee.

Overdue Task Notify tax firm of new initiation for the employee trip  
Notify tax firm about new employee assignment.

Today

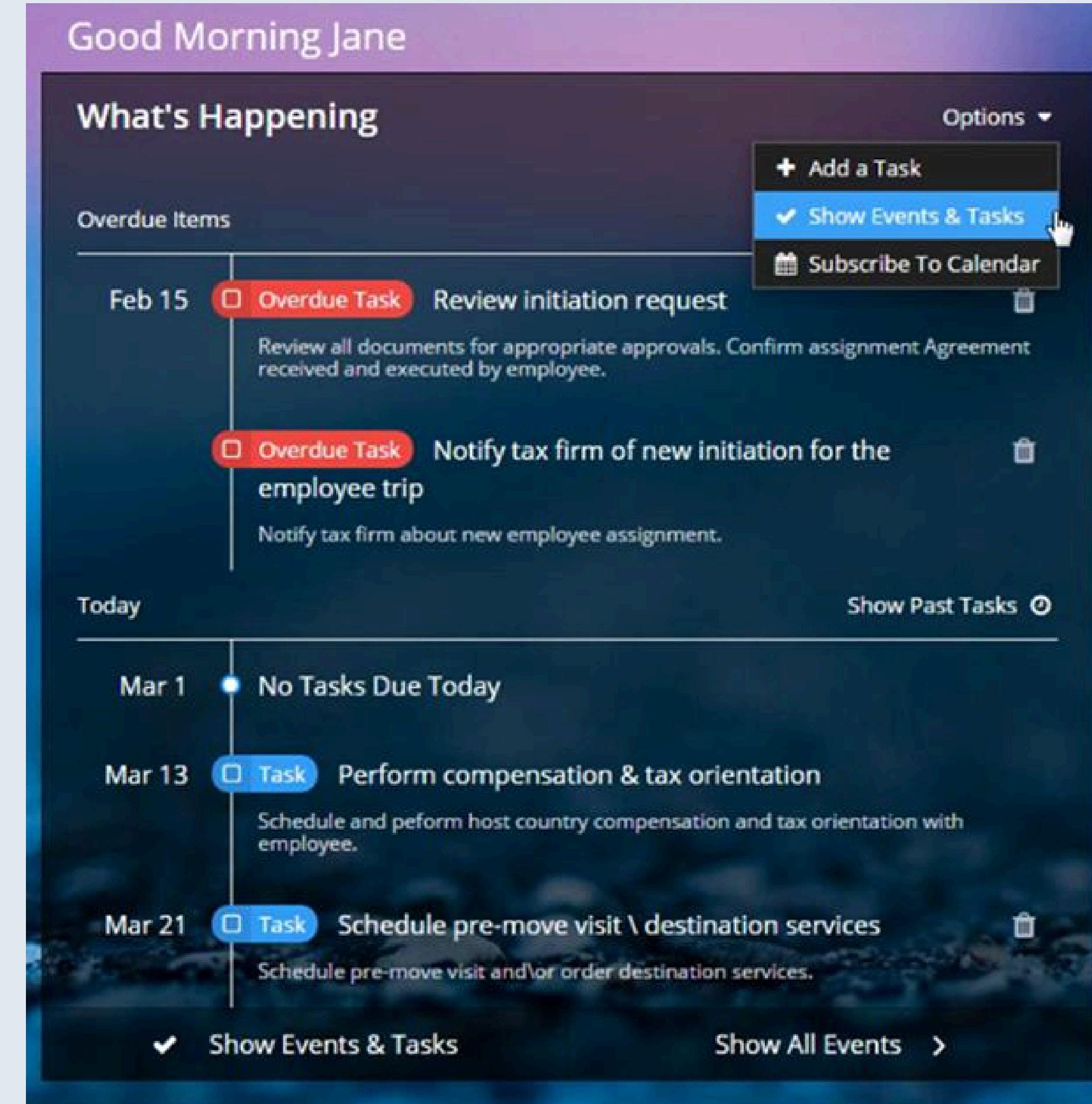
Mar 1 No Tasks Due Today

Mar 13 Task Perform compensation & tax orientation  
Schedule and perform host country compensation and tax orientation with employee.

Mar 21 Task Schedule pre-move visit \ destination services  
Schedule pre-move visit and/or order destination services.

Show Events & Tasks

Show All Events >



Good Afternoon Andy

What's Happening

Options ▾

Overdue Items

Jan 5 Overdue Task  
Review and update your preferred phone number  
Ensure that you have added the phone number at which you prefer to be contacted.

Today

Jan 20 Nothing Scheduled Today

Jan 25 United States Pre-Departure Tax Interview

Feb 1 Task Send Out Change of Address Notices



Interactive & animated prototype Live build

Mobile

## Process and Solution

**Design Concepts:** Developed progressive web app concepts that used a modular approach with cards, accordions and modules to present information clearly.

### Assignee 7 - Scotland

“It would have been nice to have a place to see vendors, household goods, tax and cultural links. Having visibility of an assignment company. And visibility of benefits, policy and docs on the mobility process, essential.”

# Interview insight for task completion

User Interviews



## TASK COMPLETION

Would you rather sit down and complete all your tasks as quickly as you can?  
OR progressively complete task by task?

- 10 progressively complete task by task
- 3 as quickly as you can

### Completing tasks

■ Most users seem to like to be guided through tasks so they can prioritize them in a structured format. The gathering of materials is important for efficient task completion in many cases.

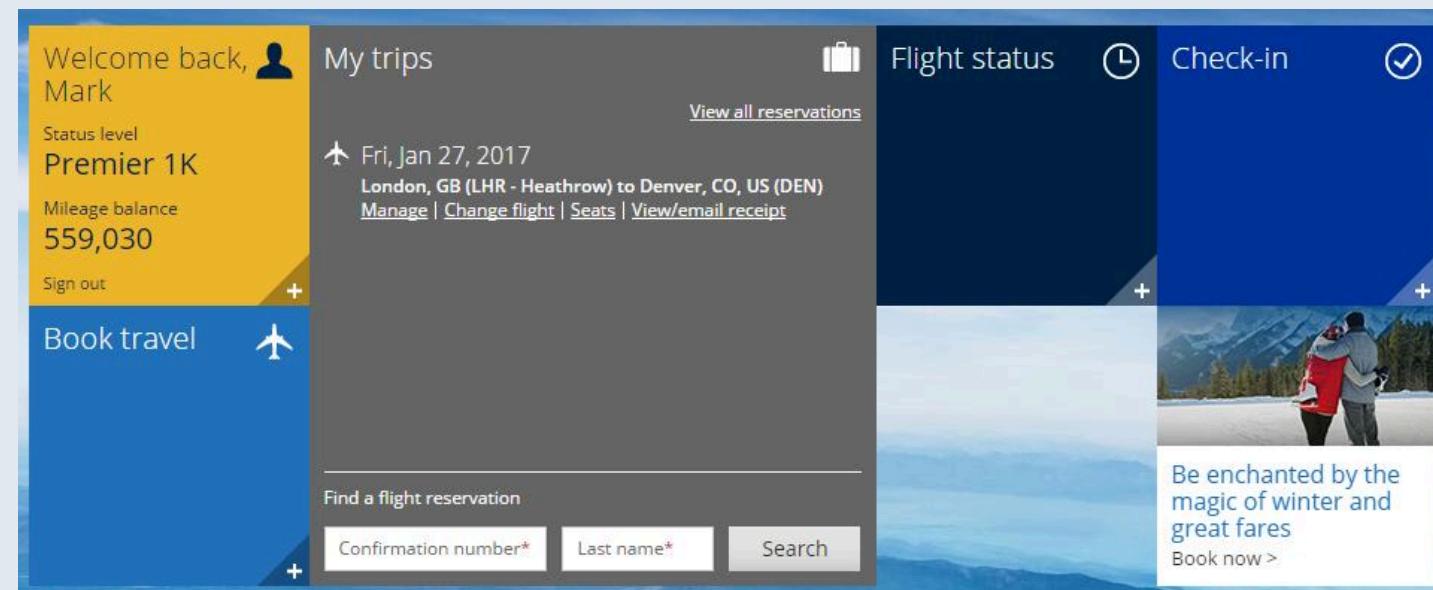
To manage the complex ecosystem of benefits and vendors, I established a clear visual hierarchy using a card-based UI. These cards compartmentalized complex workstreams—like taxes and immigration—breaking down heavy requirements into focused, manageable tasks such as document scanning and multi-step approvals.

# Cards for Benefits and Services - A modular approach

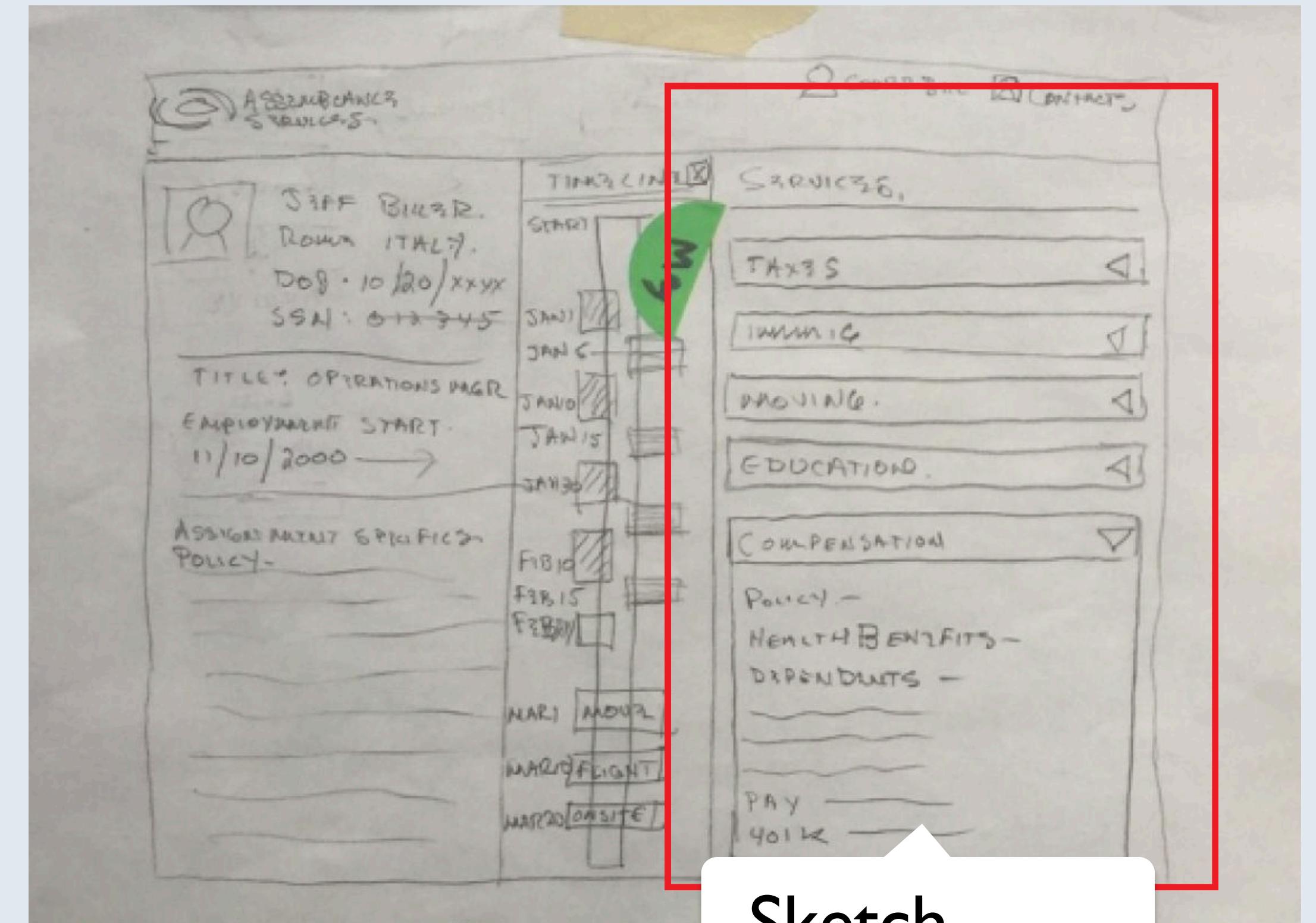
During the "Lightning Demos," the team rallied behind an animated masonry layout. This component became difficult to scale responsively and became awkward in mobile.

I proposed pivoting to an accordion component with status badges and document counts.

This maintained a clear hierarchy for benefits, providing users with much-needed focus and a understanding of their outstanding tasks.

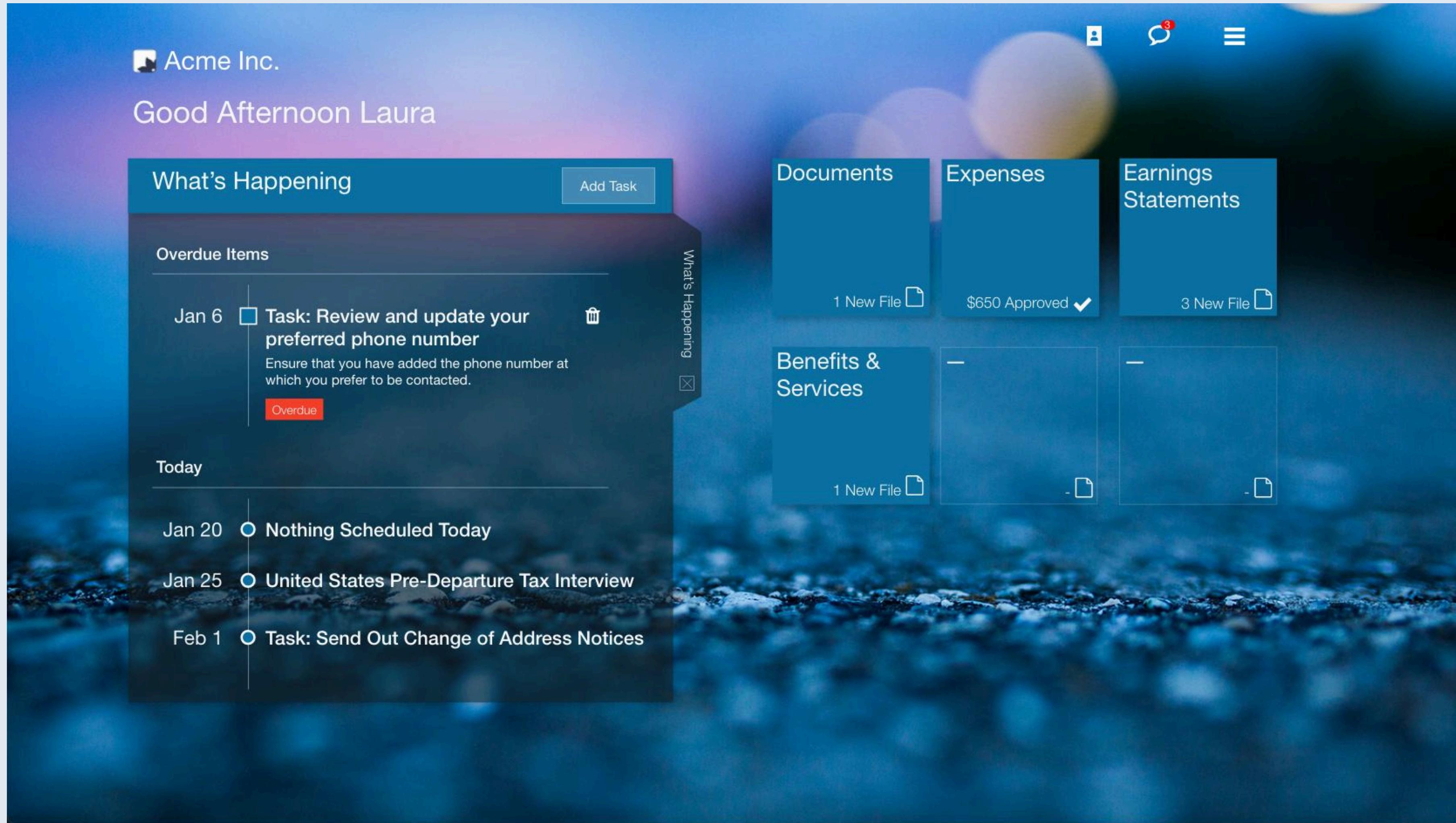


Masonry voted into the design



Sketch showing accordions for benefits and services

# Masonry cards - Prototype



Although delightful on desktop, animations and resizing for responsive became jarring and glitchy.

# Accordion style cards - Live Build

Good Afternoon Laura

**What's Happening**

Overdue Items

Jan 5  **Overdue Task** Review and update your preferred phone number  
Ensure that you have added the phone number at which you prefer to be contacted.

Today

Jan 20 • Nothing Scheduled Today

Jan 25 • United States Pre-Departure Tax Interview

Feb 1  **Task** Send Out Change of Address Notices

Feb 7 • Pre Move Trip Starts

Show All Events >

**Earnings Statements** 1 New

**Benefits & Services**

**Documents** 2 New

**Expenses** 2 Updated

2 Apr \$ 3,234,543.00 USD Approval in Progress

10 Mar \$ 8.06 USD Denied

14 Feb \$ 89.89 USD Paid

23 Jan \$ 243.00 USD Draft

16 Jan \$ 0.76 USD Submitted

+ New Expense Report

Show All Expenses >

Planned Feature

Custom Content

Washington DC to Copenhagen, DNK Jan 2017 - Dec 2020 Assignment >

Copenhagen to Anchorage, USA Feb 3, 2017 - Feb 10, 2017 Business Travel >

Anchorage to Guindakpan Island, PHL Jan 2017 Permanent Transfer >

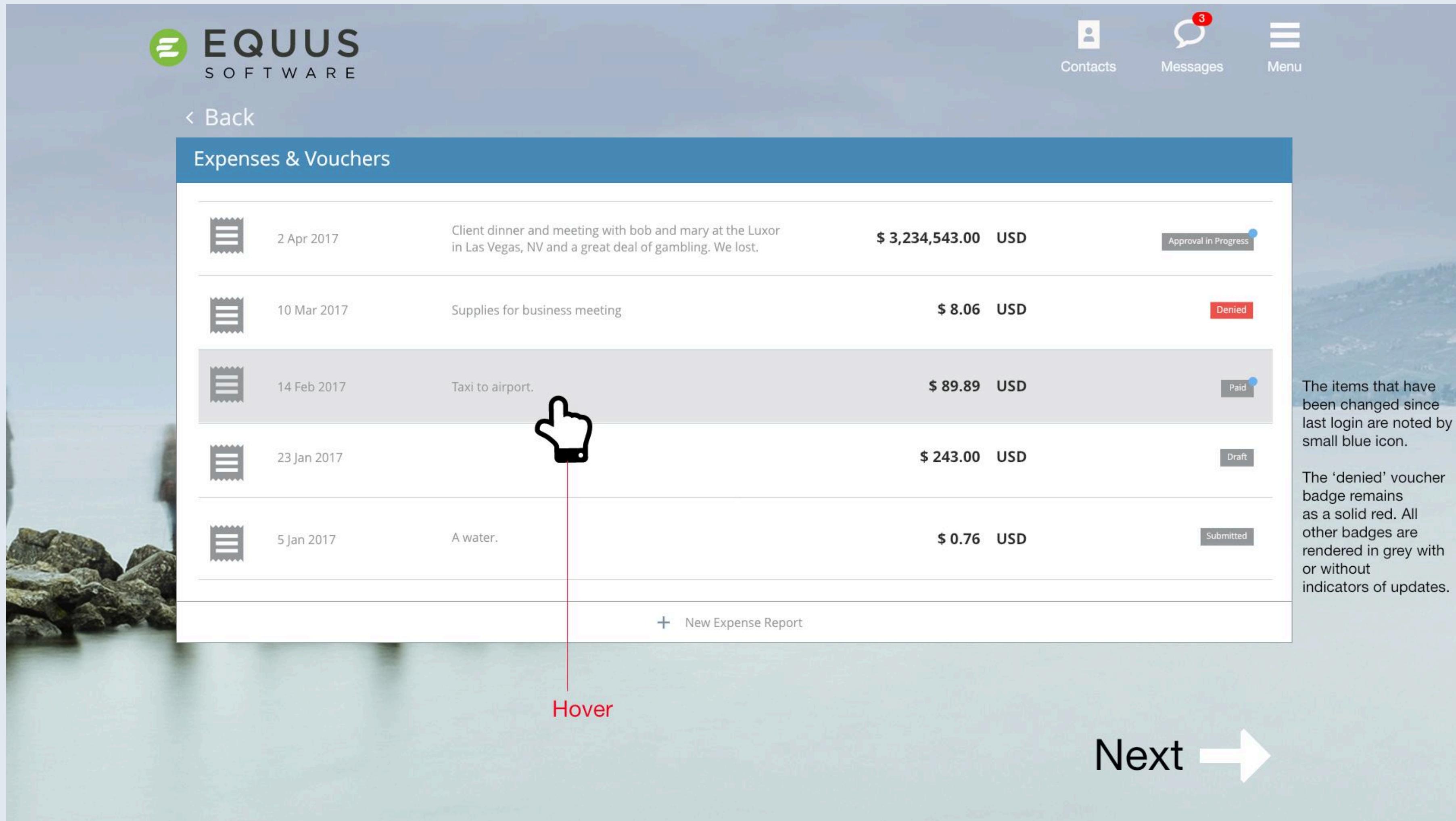
We have added a different label to these alerts. The Label is now "Updated". This will cover singular and plural updates.

Click here

An accordion worked better for desktop to mobile because it took up less space and interactions were fluid.

Mobile

# Modular approach to page design



The screenshot illustrates a modular approach to page design, focusing on the 'Expenses & Vouchers' module. The page is divided into several distinct sections:

- Header:** Features the EQUUS SOFTWARE logo, a back navigation link, and a top navigation bar with 'Contacts', 'Messages' (with a red '3' badge), and 'Menu'.
- Section Header:** 'Expenses & Vouchers'.
- Content Area:** A list of expense reports with columns for date, description, amount, and status. The third report is highlighted with a grey background and a hand cursor is hovering over it. A red vertical line labeled 'Hover' points to the cursor.
- Footer:** A 'New Expense Report' button.
- Right Sidebar:** Contains two text blocks with explanatory text and icons: one about items updated since login and another about denied vouchers.
- Bottom Right:** A large white arrow labeled 'Next'.

**Hand Cursor:** A hand cursor is positioned over the third expense report in the list.

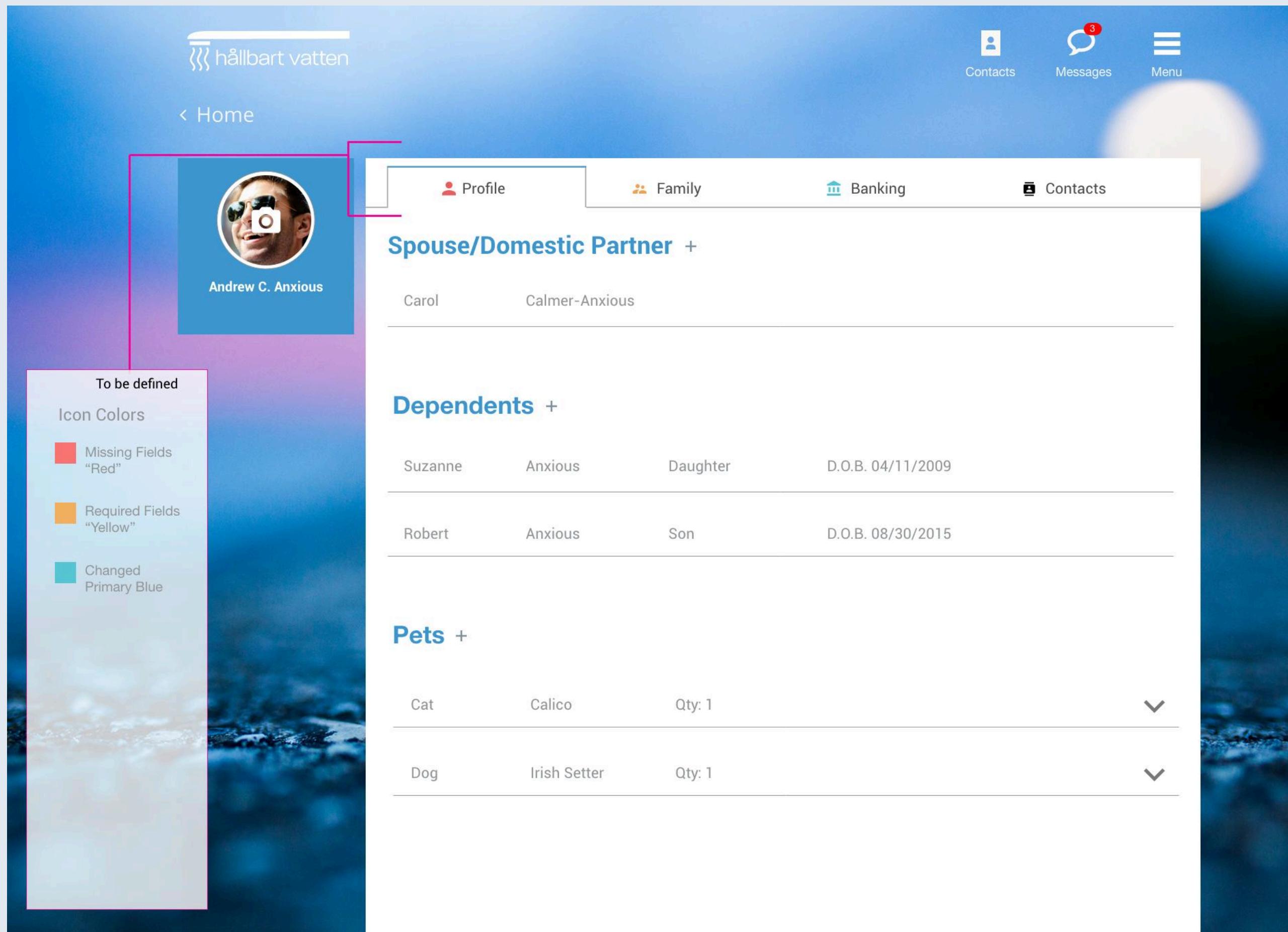
**Hover:** A red vertical line with the word 'Hover' indicates the current mouse position over the third report.

**Next:** A large white arrow pointing right, labeled 'Next'.

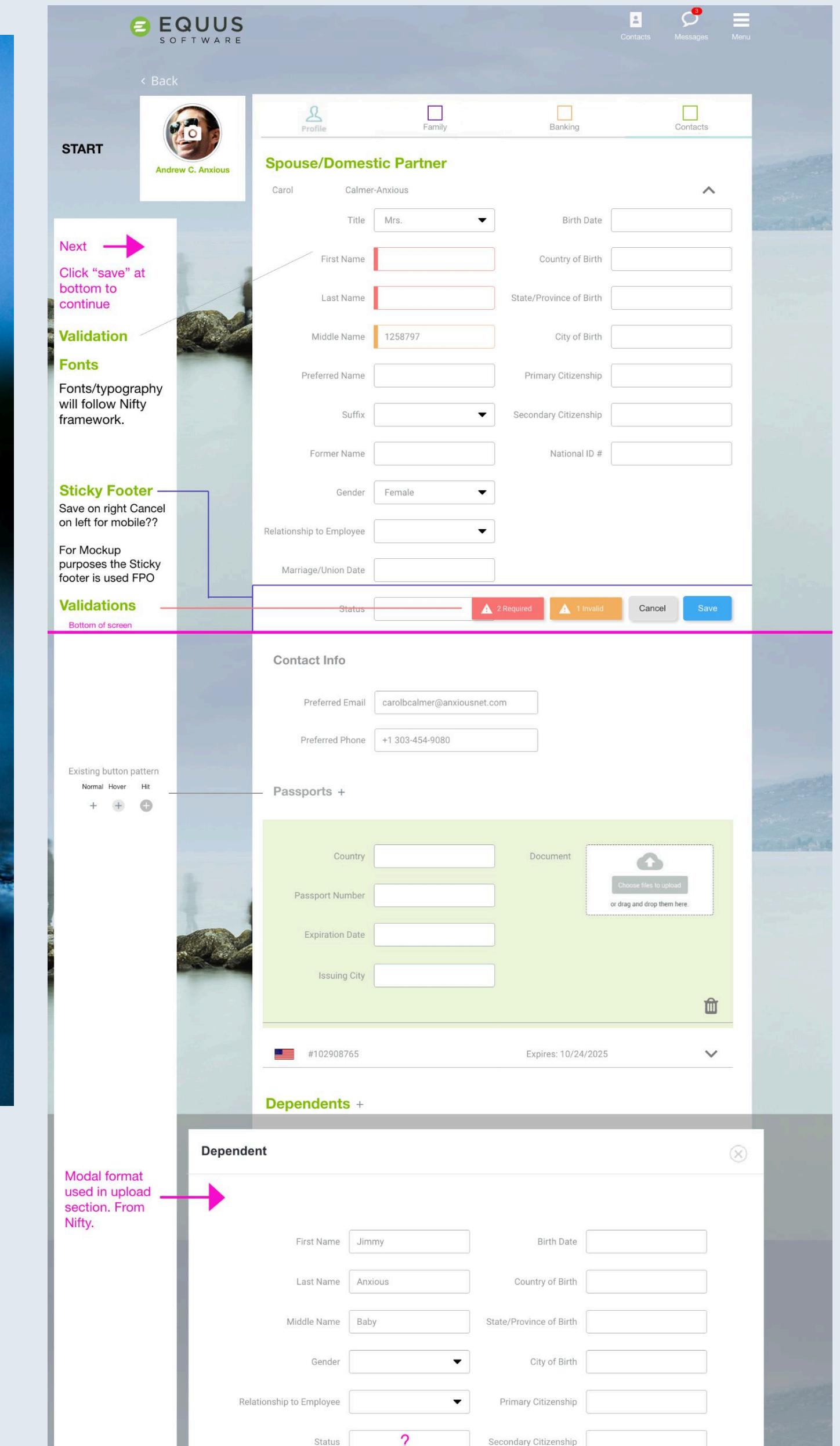
Date	Description	Amount	Status
2 Apr 2017	Client dinner and meeting with bob and mary at the Luxor in Las Vegas, NV and a great deal of gambling. We lost.	\$ 3,234,543.00 USD	Approval in Progress
10 Mar 2017	Supplies for business meeting	\$ 8.06 USD	Denied
14 Feb 2017	Taxi to airport.	\$ 89.89 USD	Paid
23 Jan 2017		\$ 243.00 USD	Draft
5 Jan 2017	A water.	\$ 0.76 USD	Submitted

The placement of this screen shows the user is given a focus area to interact with the task of uploading documents, to be displayed on the cards.

# Vertical modules



Profile screen showing full length modules for adding dependents and pets. Allowed for vertical scrolling and variable form fields and uploads.



# Process and Solution

**Key Features:** Designed a centralized messaging system to drive conversations and keep the process organized, created visualizations for conversations, and provided host country information guides to inform users.

## Communications

### Assignee 10 - Canada

“It was hard for them to find someone for any of the roles at the company. Assignee retention for all their assignments were a failure. The way they select someone, the way they handle it. Everyone was surprised when they arrived. They did not communicate well. The relocation process was awful. I didn't know who to talk to. I kept being bounced around from person to person... Once I arrived I had to do everything by myself.... We spoke for a while before I went and I felt they didn't disclose certain things until I was on site.”

## Reach out to me!

### Stakeholder 8-

“I want one platform to accommodate all users. I think the answer is that all of this should be accessible everywhere and is extremely deep. This isn't a challenge that we should back down from. Plenty of companies that have complicated apps are on mobile devices.”

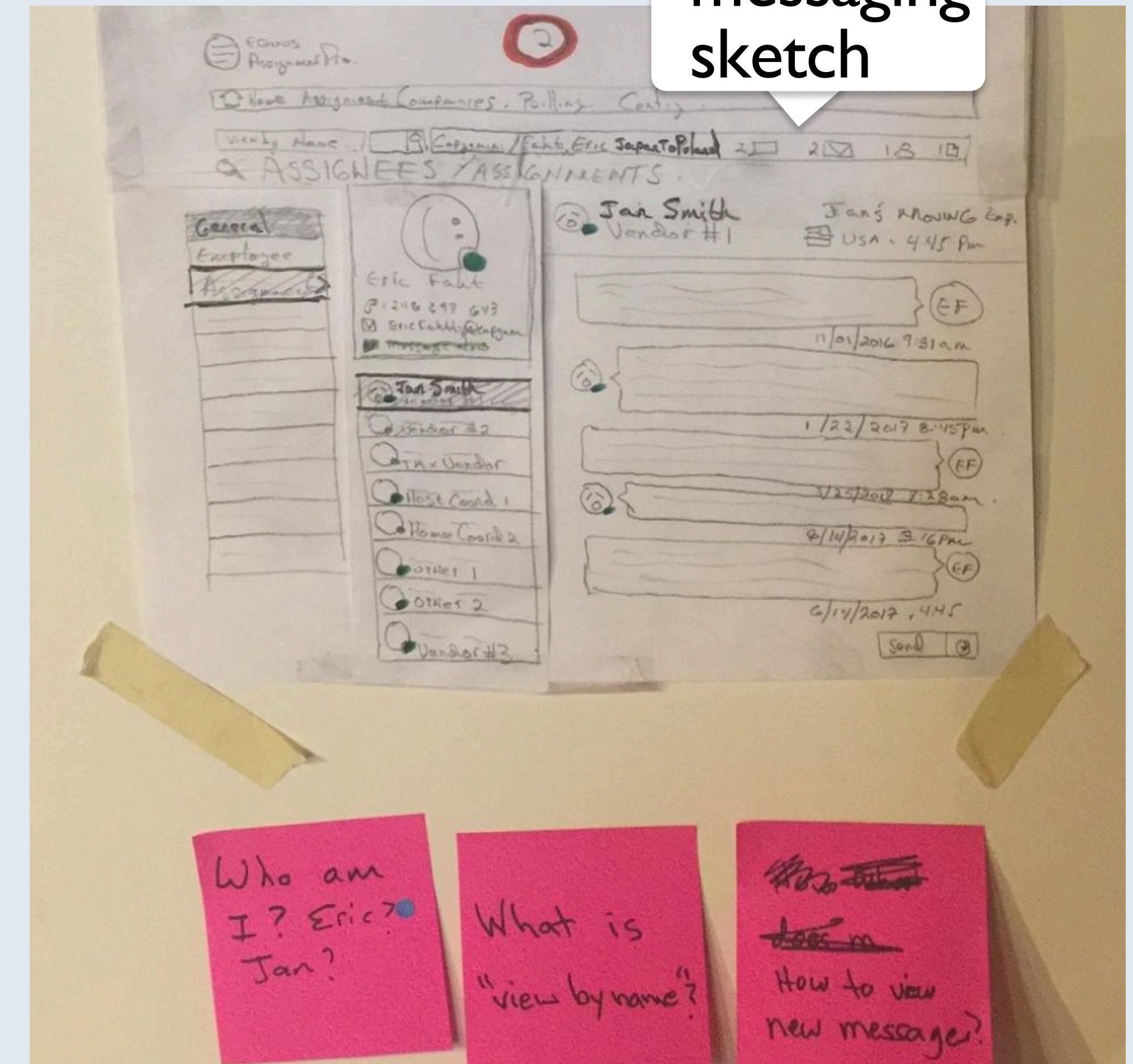
“Mobile application that I can open up anytime I have a question or something important happened related to my move and that info is immediately available to me. Eg. vendor info, dates or anything related to my move. I know if I was moving around, I'd want it in my pocket/on my phone. I want it to reach out to me. I want the app to push and tell me what I should care about. Eg., push notify, e-mails, texts. This is a complicated move --someone else should be walking me through it and it should be on my phone.”

# Streamlining Global Mobility Communications

During design sprints, I addressed the challenge of integrating a unified messaging tool into Assignment Pro.

The goal was to bridge communication between Global Mobility teams, third-party vendors, and assignees—supporting diverse channels like text and email.

I focused on delivering a clear, consistent experience for assignees while ensuring all client stakeholders received real-time, role-specific updates within a complex ecosystem.



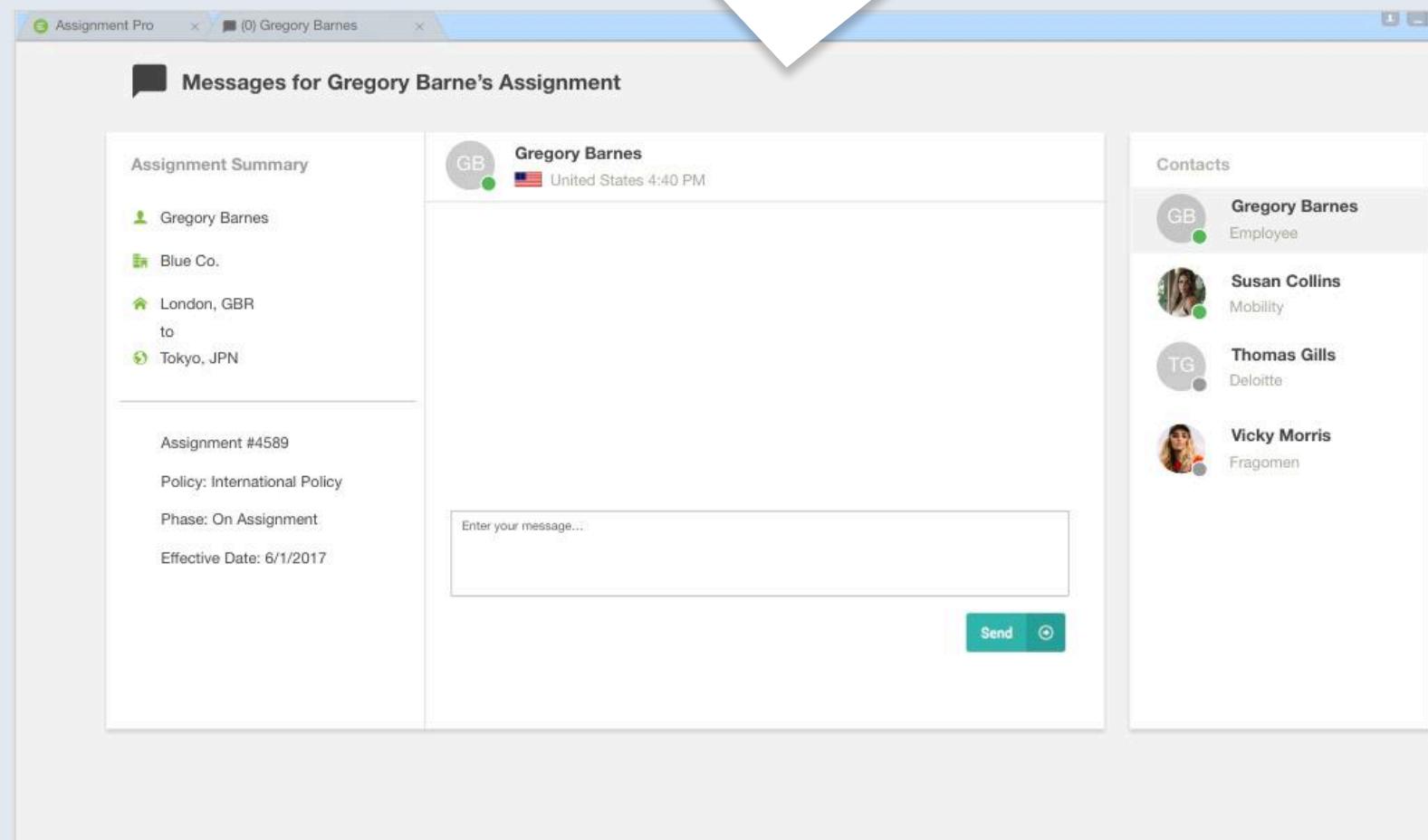
# Navigating Complex Messaging

I addressed a landscape of fragmented connection points, diverse applications, and rigorous security protocols.

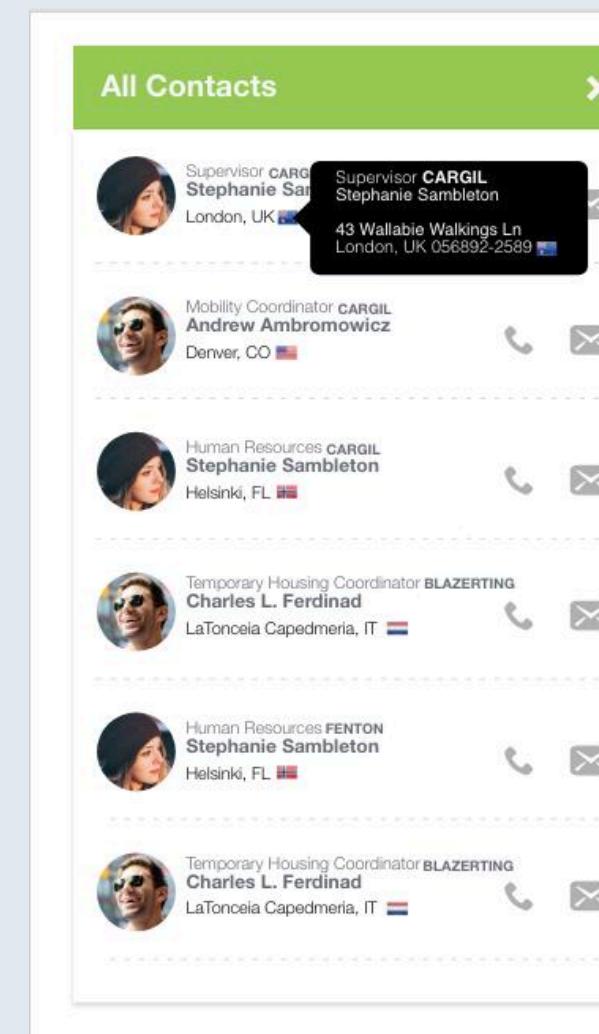
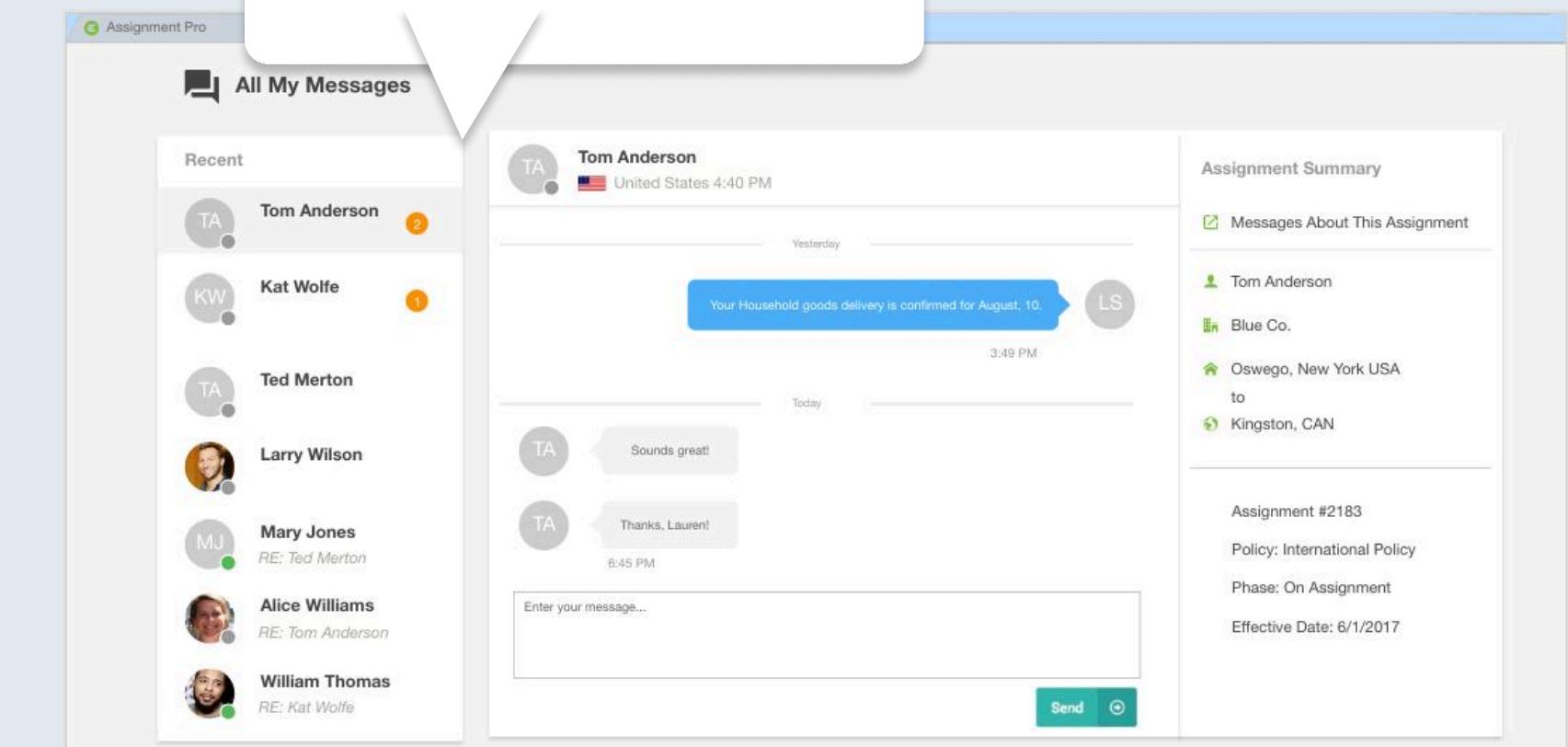
## The Outcome:

We enabled Assignees to remain fully engaged and informed—whether at home, in the office, or on the move—by tailoring the experience to their specific device preferences and communication habits.

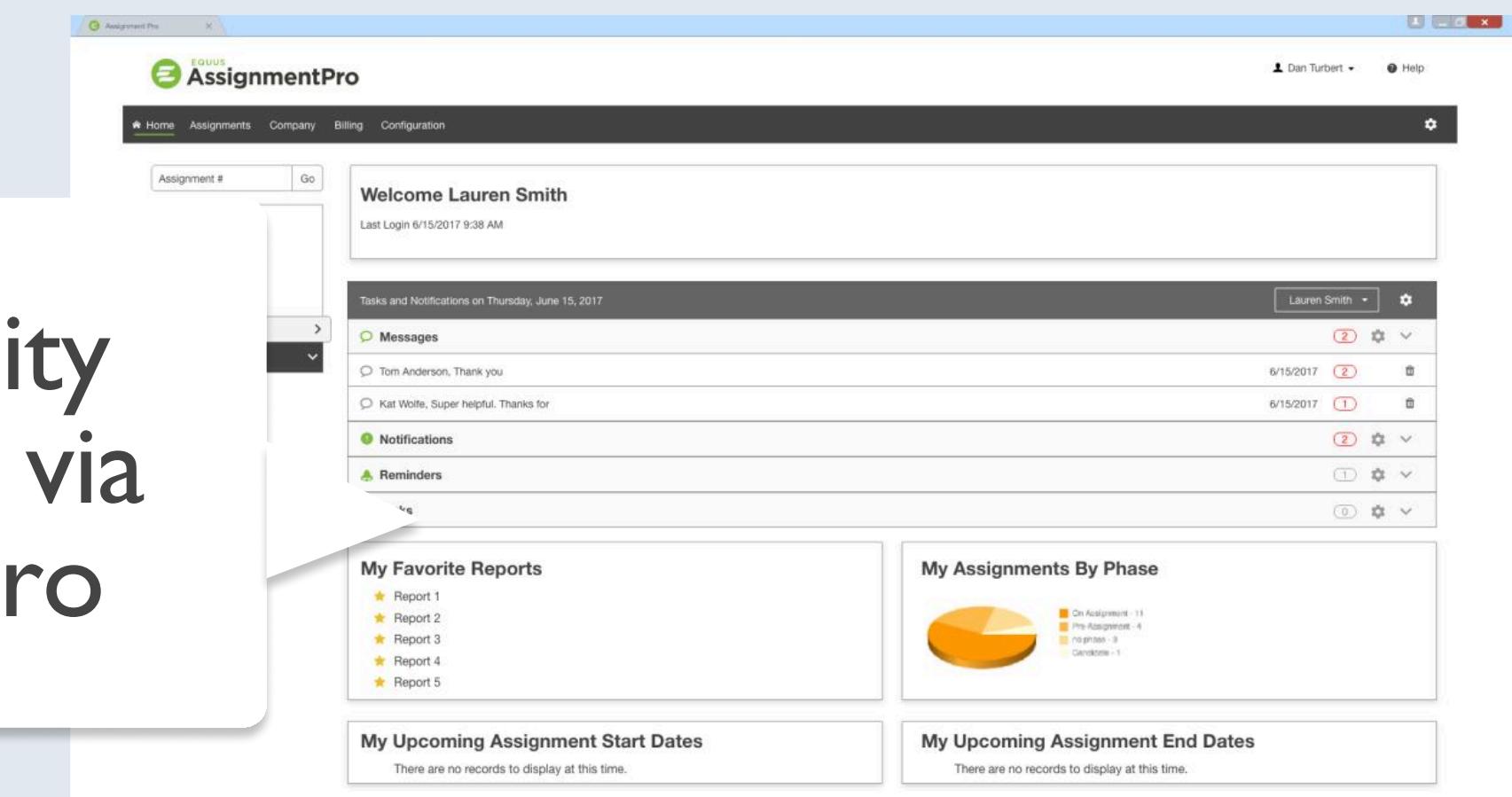
Assignee in Portal, email or text



Vendor via Web



Global Mobility Coordinator via AssignmentPro

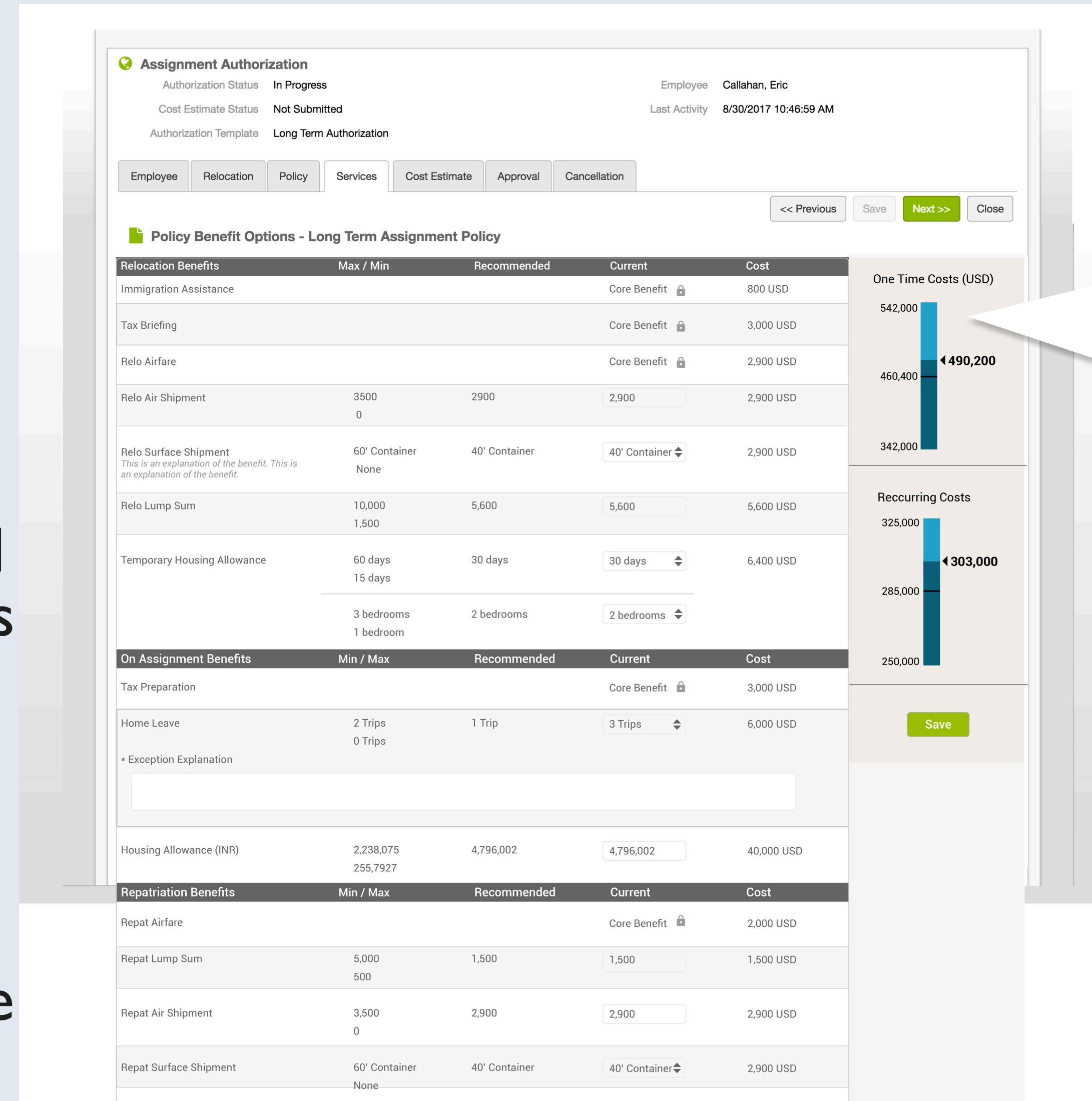


# Visualizing Financial Impact

I integrated a dynamic bar graph into the HR interface to provide a high-level overview of relocation costs.

This allowed HR users to track incurred expenses—such as transit, storage, and international relocation fees—in real-time.

By transforming complex data into a visual format, we facilitated more timely decision-making and precise budget oversight.



Adds context and visualization to the conversations with the assignee.

# Host Country

## Preparedness for life changing experience

### Cultural preparedness

#### Assignee 6 - (Awaiting Hong Kong or Asian Assignment)

“For us it is essential to understand, Schools, connections to other expatriates. Locations and where we’re going to live (housing). You have to know where your office is - the assignee and spouse really need to know exactly where they’re going... You have to be prepared culturally. It’s a big change - if you’re a person who is used to having lots of space or in a car all the time. It’s expensive. You have to be up-front with your people that they will be in a high-rise without access to outside or without a garden. The assignee really needs to understand the differences. Just being up front with what you’re getting into. Is it a single person? Or is it a person with children? Children change everything. Example: We didn’t go to Beijing because we didn’t want our kids to live in polluted air.”

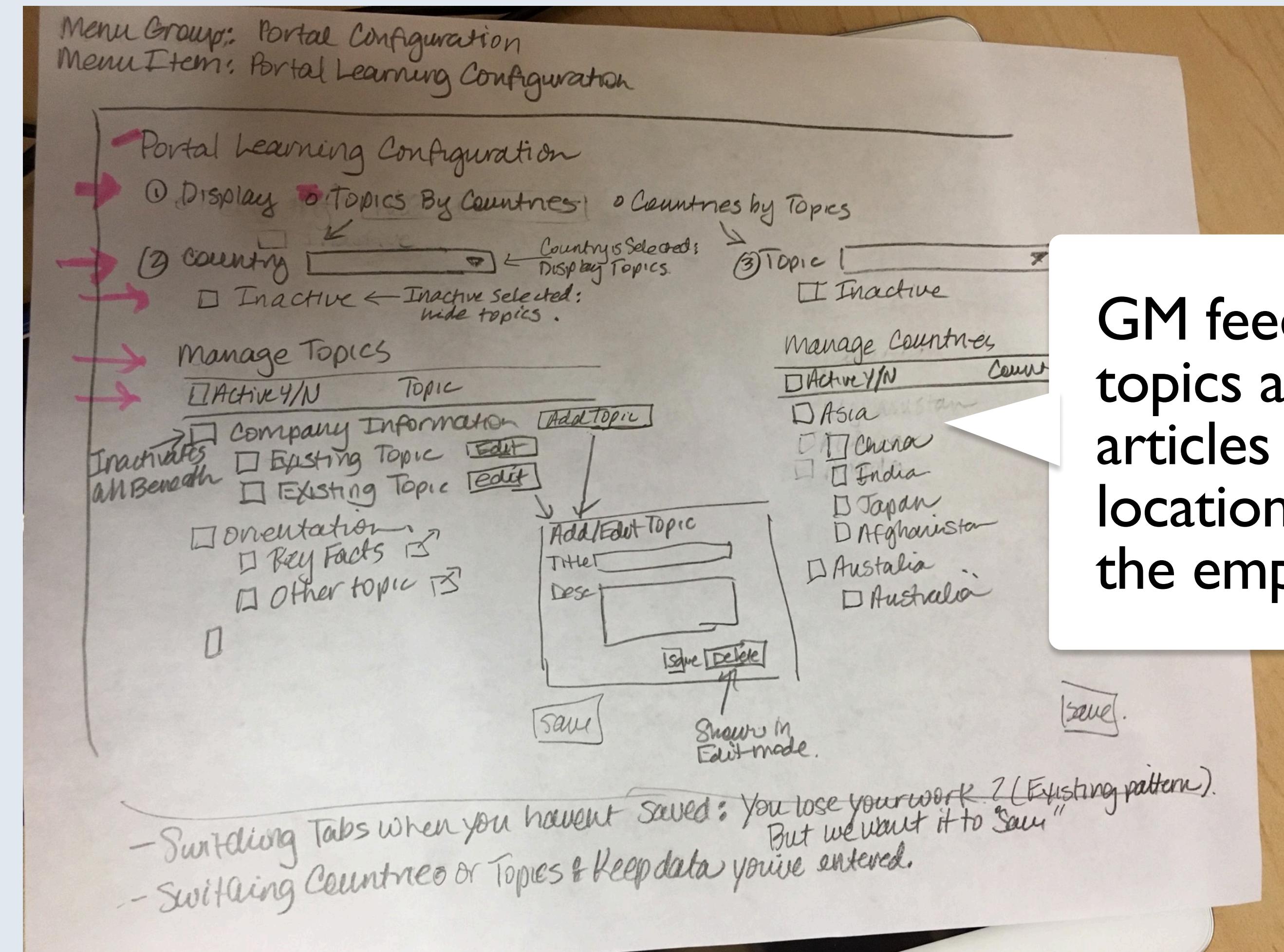
### Communicating Expectations

#### Assignee 9 - Singapore, Vietnam, Australia, USA

“I work with international employees that need visa status at times. I look at their work and coach them and set the employee’s mindset to the clients expectations. A lot is coaching and communicating expectations. Give them a taste of the culture, the language, health needs. I think a website that communicates. A welcome kit, resources, FAQ, location, travel info, crime rates. I recently did some hires from Philippines. They have a page that explains Filipino communication. Asians- indirect. Americans- direct.”

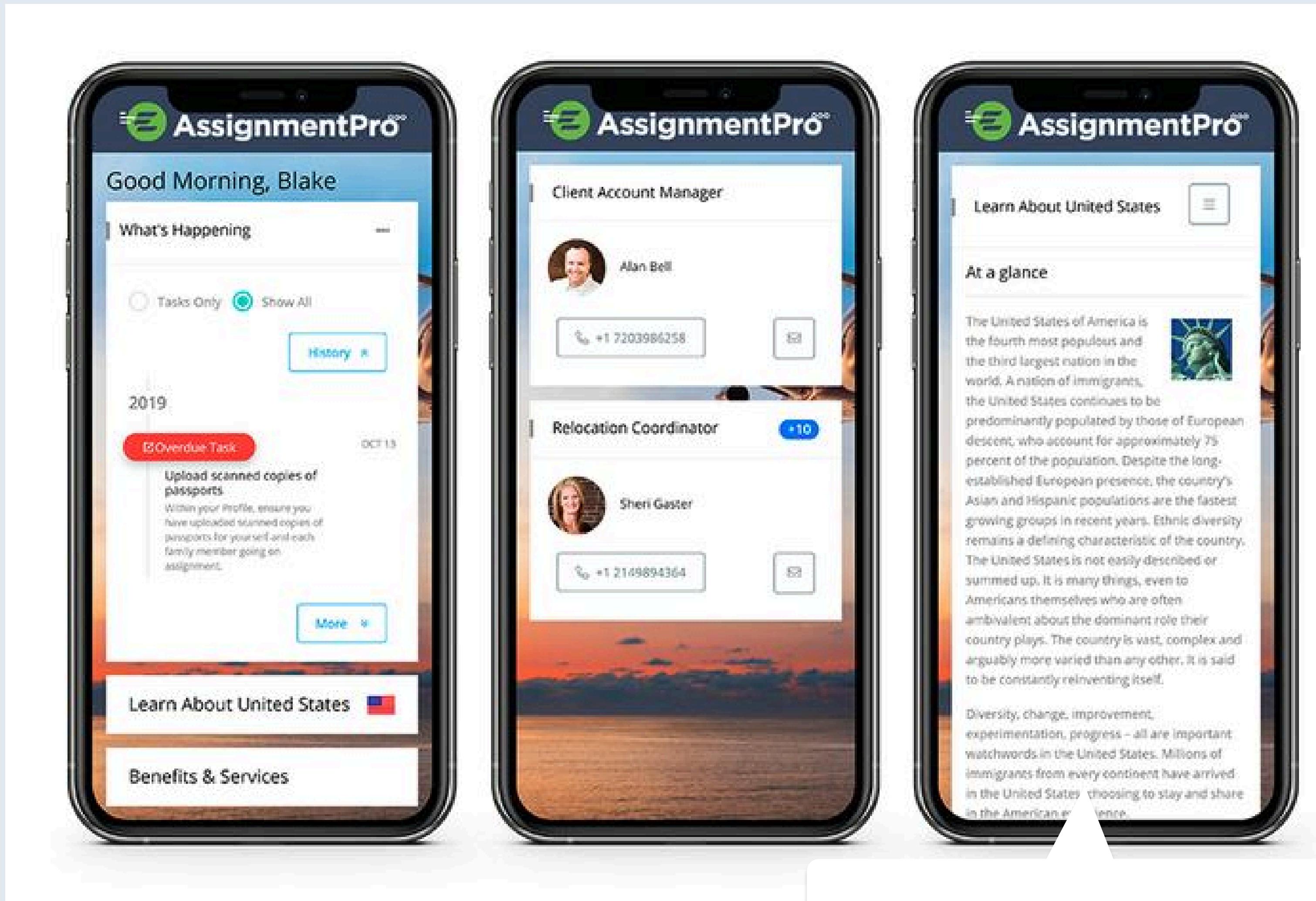
# Host Country - provided by admin

By offering the assignee a glimpse of targeted resource articles of the country they were offered in their policy they could make a better decision. The HR and Global Mobility team could feed articles from Assignment pro and provide resources that would relate to the specific location. Housing, transportation, education for children, politics, drivers licensing etc.



GM feeding topics and articles about locations to the employee

# Host country resources to alleviate ambiguity for this life change



At a glance details for host country

## Mobile Employee Experience

Not sure how to manage your global mobility adventure? The good news is that your GM Coordinator can now arm you with a tool, the [Mobile Employee Experience](#). A tool to quickly navigate that checklist in the back of your head, the one your spouse has been asking you about. The Mobile Employee Experience uses data from [Living Abroad](#), a company that continuously monitors over 187 countries around the world. Living Abroad answers questions like: "What can I expect the business culture to be like?", "Where can I open a local bank account?", "How do I get a driver's license?", "What are the school options for my children?" or, "Are kangaroos dangerous?"

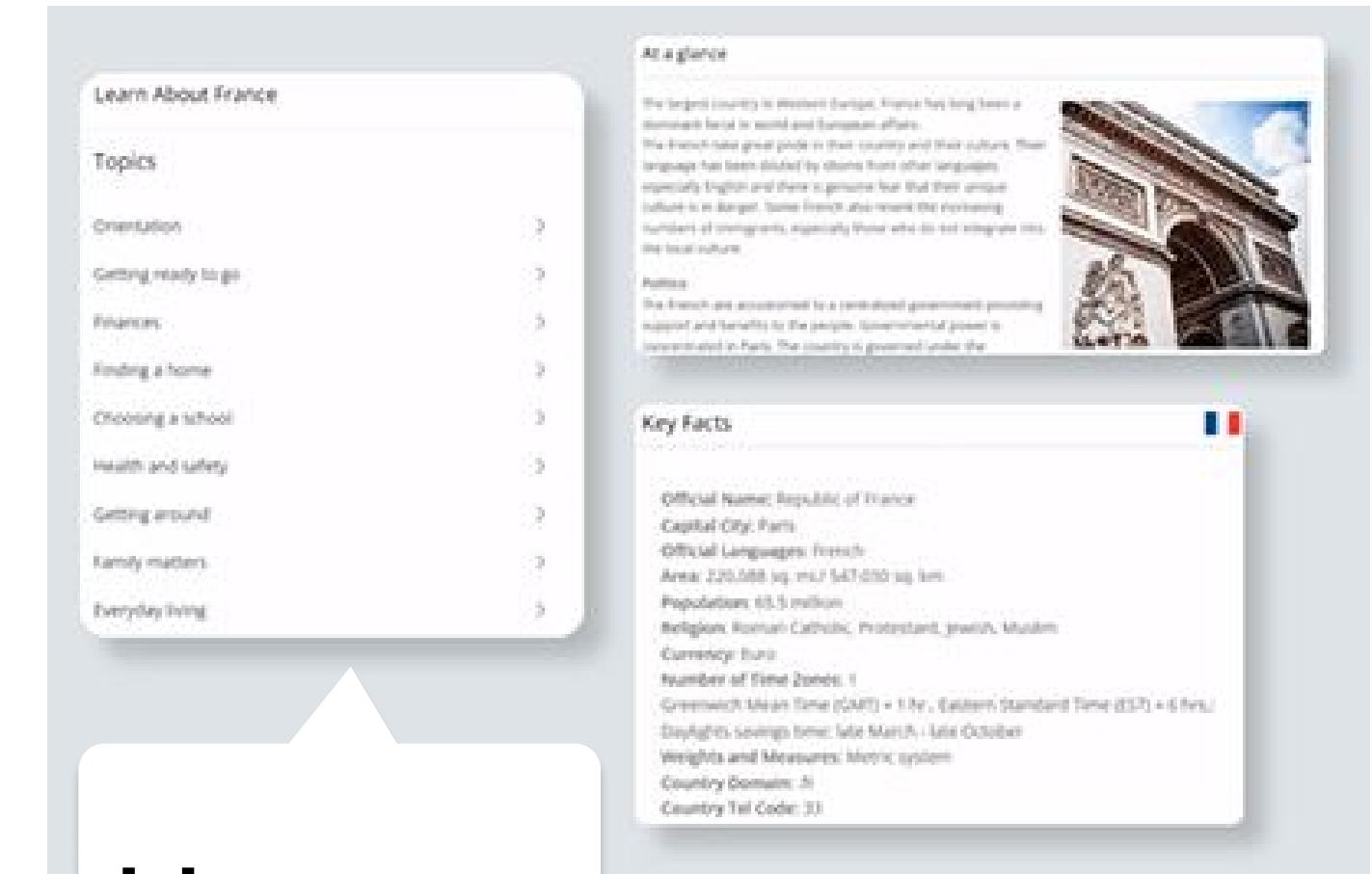
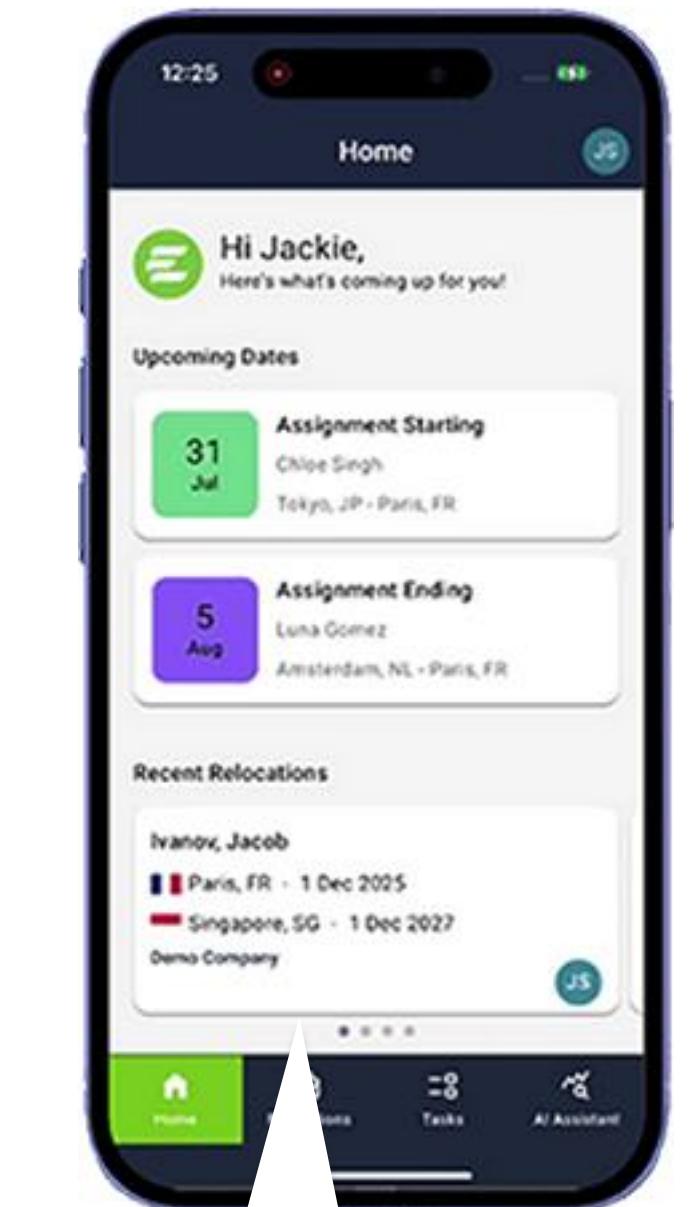
## Tax & Immigration

You can also use the Mobile Employee Experience to keep track of the tax, immigration, and other forms related to your move. You can connect with your Global Mobility Coordinator via the

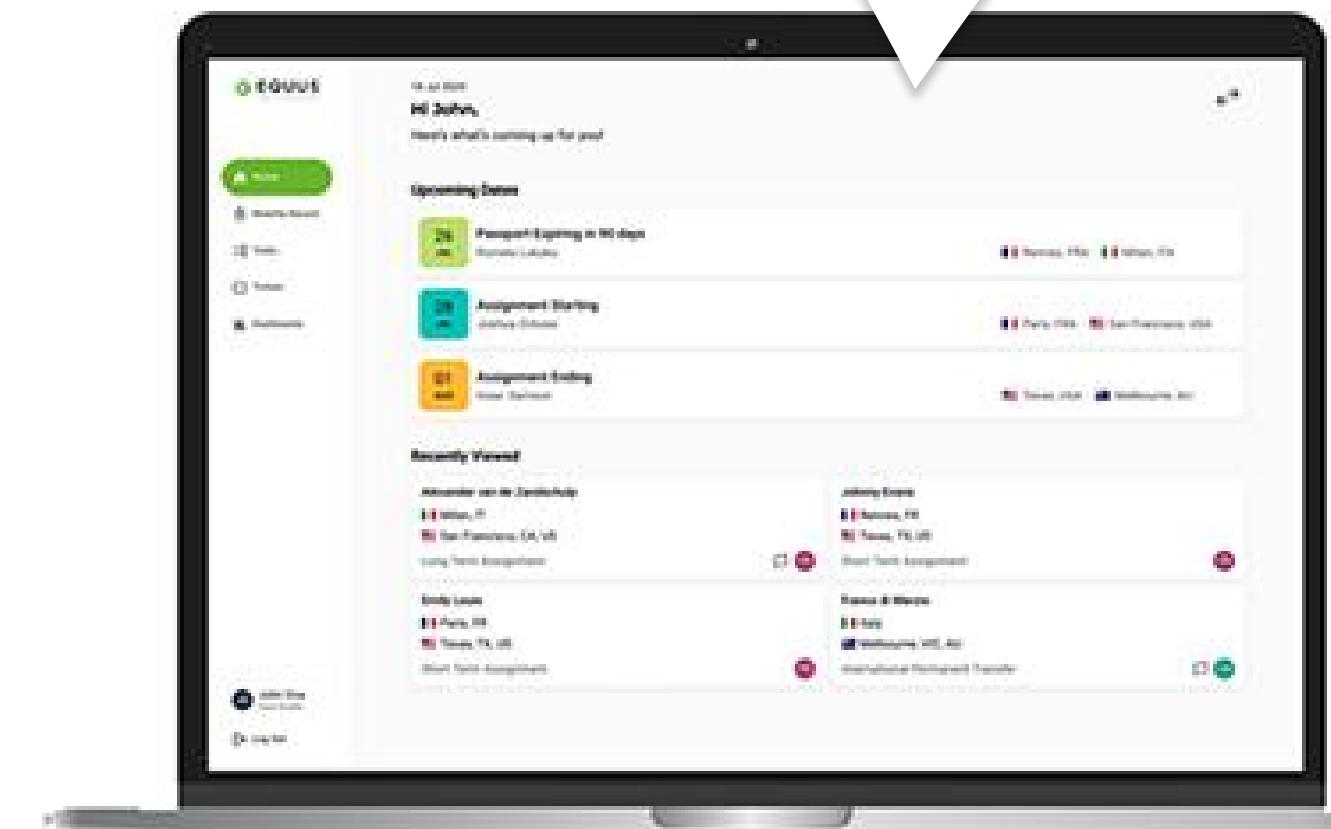
# Timeless research that continues to evolve for the assignees need for stress free global mobility.

The impact of this my contributions were immediate and enduring. By shifting to a modular, card-based architecture and implementing **progressive disclosure**, we successfully reduced cognitive overload and gave employees a clear, actionable roadmap for their move.

The success of the project is best evidenced by its **longevity**: nearly a decade later, the core features I designed—including the 'What's Happening' timeline, the centralized messaging system, and the host-country information architecture—remain the backbone of the Equus Mobile Employee Experience today. We transformed a stressful, scattered process into a user-friendly app that gives employees total control over their relocation journey.



Host  
Country



Timeline

Tasks

Communications