

Goals

Last Modified on 16.06.2026

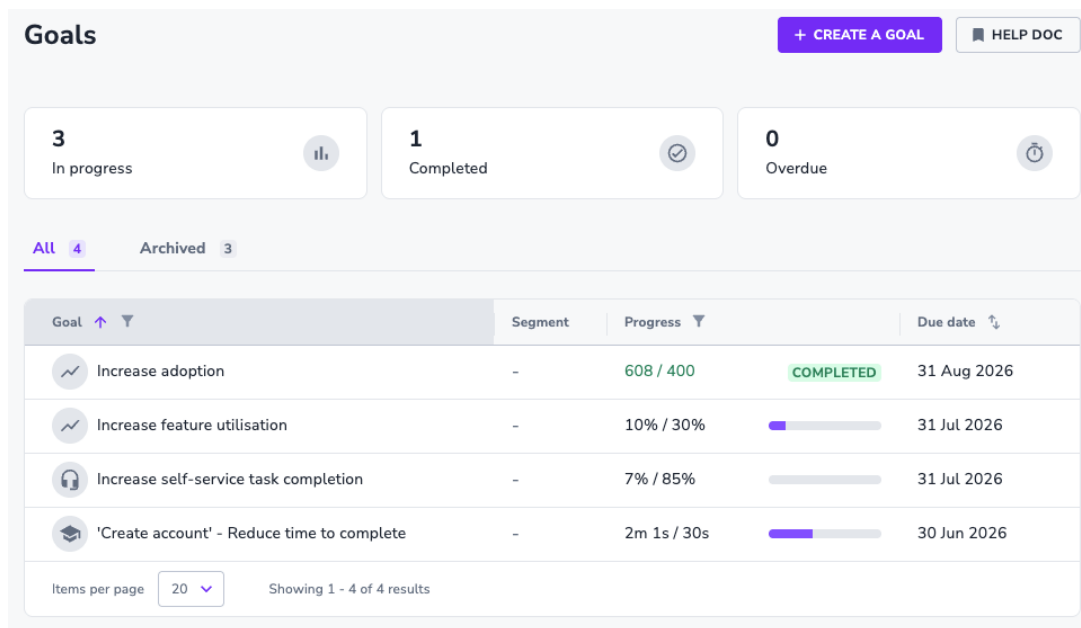
Goals connects Userlane's behavioral data to the specific outcomes your organization is accountable for. Define a target, a deadline, and an optional segment, and Goals tracks progress automatically. No manual exports or additional configuration required.

How it works

Each goal tracks one metric against one target. When creating a goal, you define:

- **The outcome area** - chosen from four options: reduce time/cost to learn, reduce errors, reduce support tickets, or drive usage/adoption
- **The target** - the value you are committing to reach
- **The deadline** - the date by which you expect to reach it
- **The segment** (optional) - a specific user population to scope the measurement to

Progress updates daily (overnight) using the same behavioral data that powers your HEART score.



Creating a goal

To create a new goal:

1. Navigate to **Goals** in the left navigation of the Userlane Portal.
2. Click **Add goal**.
3. **Select an outcome area.** Choose from: Reduce time/cost to learn, Reduce errors, Reduce support tickets, or Drive usage/adoption. Select **None of the above** to continue without pre-filtering.
4. **Select a goal.** Choose a pre-built goal from the list. Each goal shows its name, a short description, and the metric it tracks. Select **None of the above** if none of the options fit.
5. **Select the specific Tasks, Guides, Validators, Tags, or Messages** the metric will track. The options shown depend on the goal type.
6. **Set your goal details.** Enter a name, set your target value, choose a due date, and optionally select a

segment. The current metric value is displayed as your starting point and captured automatically when you save.

7. Click **Create a goal**.

Reduce time / cost to learn
Get users productive faster and reduce training cost

Reduce time to complete key workflows
Measure how quickly users complete critical workflows to evidence efficiency gains

Metric
Task completion time

Segment
Everyone

Set the Goal details

3m
Start value

CONDITION: Below or equals TARGET VALUE: 2 min

GOAL NAME: Create account - Reduce time to complete

START DATE: 9 Jun 2026 DUE DATE: 31 Aug 2026

← BACK CREATE A GOAL

The Goals view

The Goals page shows all active goals for the current application. Each row displays:

- **Goal name and outcome area**
- **Segment** - the segment applied, if any
- **Progress** - a progress bar for in-progress goals, or a current/target value pair with a status badge for completed and overdue goals
- **Due date**

Three summary cards at the top of the page show the current count of in-progress, completed, and overdue goals.

Click any row to open the goal detail drawer on the right side of the page. The drawer shows the full progress record: start value, current value, target, due date, metric, and segment.

Archived goals are available in the **Archived** tab. They are read-only and cannot be reactivated.

Goals

3 In progress | 1 Completed

All 4 | Archived 3

Goal	Segment	Progress
Increase adoption	-	60%
Increase feature utilisation	-	10%
Increase self-service task completion	-	7%
'Create account' - Reduce time to complete	-	2m

Items per page: 20 | Showing 1 - 4 of 4 results

IN PROGRESS X

'Create account' - Reduce time to complete

2m 1s (Current value) | 30s (Target value)

39% Overall progress

Start date: 9 Jun 2026 | Start value: 3m | Due date: 30 Jun 2026

Metric: Task completion time

Company outcome: Reduce time / cost to learn

EDIT

Goal statuses

- In progress - Due date has not passed and target has not been reached
- Completed - Current metric value has met or exceeded the target
- Overdue - Due date has passed and target has not been reached
- Archived - Goal has been closed manually or automatically

Editing and archiving goals

Extending a due date: Open the goal detail drawer, click **Edit**, and select **Extend due date**. Set a new date and confirm. Extending the due date of an overdue goal resets its status to In progress.

Archiving a goal: Open the goal detail drawer and click **Archive goal** (or goals in progress, click **Edit**, and select **Archive goal**). Archived goals move to the Archived tab and cannot be edited or reactivated.

Goals are archived automatically 30 days after the due date passes without the target being reached, and 30 days after completion if not archived manually.

The target value, metric, and start value cannot be changed after creation. To change the scope of what is being measured, archive the existing goal and create a new one.