



kippy

# Feature Overview

7 Dec 2024

version 1.18



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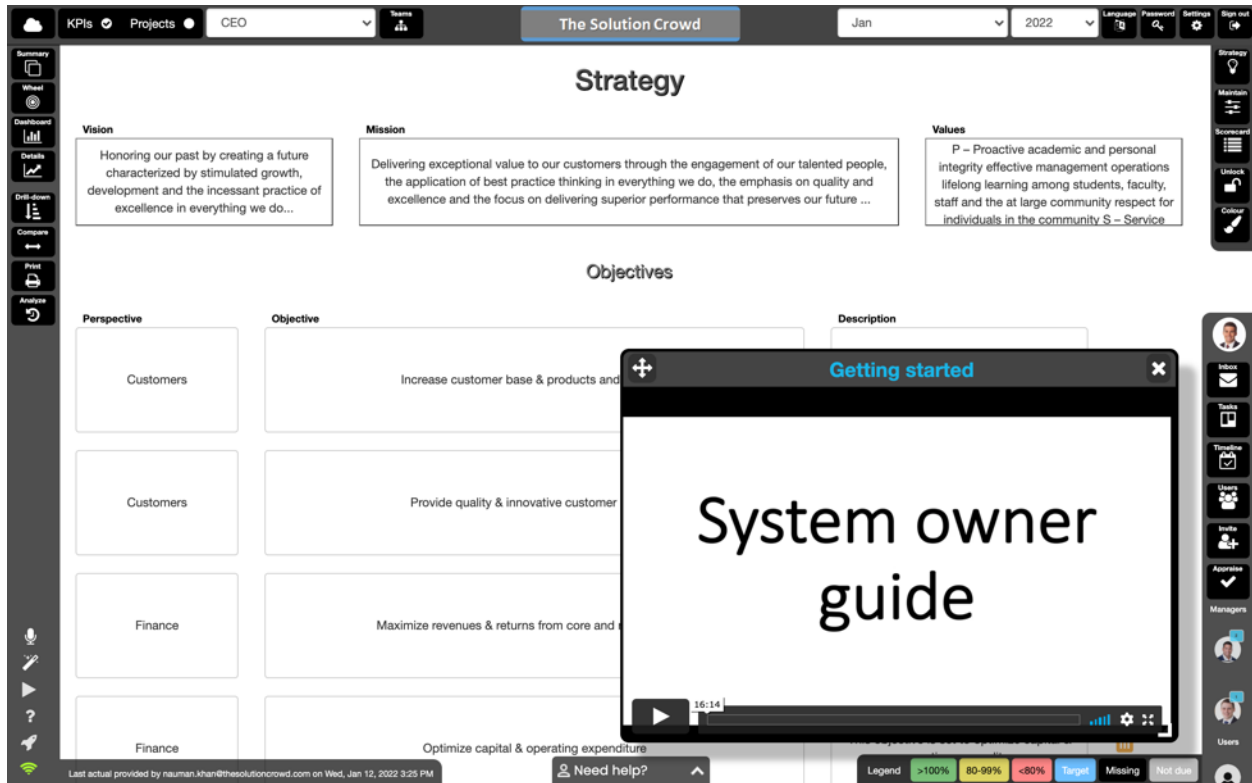
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# Intro

The following describes the key features of kippy by showing how a typical system would be set up from start to end.

Also, when you login, videos show you how to get started.





# Overview

The Overview screen provides each user with a personal view of key information and activities, which includes any due check ins and tasks.

The screenshot displays the Kippy Overview dashboard for a user named Owen Turner. The dashboard is organized into several key sections:

- Check ins (1):** Shows a notification for "1 check ins due from last month" and "1 day until lock". A table lists the check-in details:
 

Team	KPI
CEO	Supplier Cost Savings
- Inbox (36):** A list of messages:
 

From	Message	Sent
Nauman Khan	pdf-sample_0.pdf	1 month ago
Owen Turner	Please provides info about JAN	3 months ago
Owen Turner	do this	3 months ago
Owen Turner	Not happy ... please provide details	4 months ago
- Team overview (117%):** A table showing scores across different perspectives:
 

Perspective	Score
Finance	
Customers	96%
Internal Process	160.8%
People	104.6%

 Below it, an objective table:
 

Objective	Score
Cost saving	
- My overview:** A table of key performance indicators:
 

Item	Value
User's KPI Period Score	68%
Competency Score	125.3%
Live Weighted Average	95
Employee Rating	A (Exceeds expectations >80)
Last Appraised	29-May-2024 17:24
Appraiser	Nauman Khan
- Tasks (17):** A table of pending tasks:
 

Due	Status	Description
	Not started	please send file
06-Sep-2023	In progress	
16-Sep-2023	At risk	Please do this urgently
13-Oct-2023	At risk	Please check
08-Nov-2023	In progress	FYI
16-Feb-2024	In progress	
- Teams:** A table showing KPI scores for various teams:
 

Team	KPI Score
CEO	117%
Business Support	76%
Information Technology	83%
Operations	114%
Sales	85%

The dashboard also includes a sidebar with navigation options (Home, Overview, Teams, Strategy, Maintain, Scorecard, Check in, Summary, Details, Analyze, Collaborate, Manage, Reports, Tools, Help), a top navigation bar with filters (KPIs, Projects, CEO), and a bottom status bar with a "Need help?" button and a legend for KPI scores (>=100%, 70-99%, <70%, Target, Missing, Not due).

# Strategy

Firstly, the Level 1 corporate objectives and KPIs are defined and propagated down to the lower-level teams.

The screenshot displays the 'Strategy' dashboard in the Kippy application. At the top, there is a navigation bar with 'KPIs', 'Projects', and 'CEO' selected. The main content area is titled 'Strategy' and is divided into three sections: 'Vision', 'Mission', and 'Values'. Below these is a table of 'Objectives' with columns for 'Perspective', 'Objective', and 'Description'. A legend at the bottom right indicates performance levels: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

Perspective	Objective	Description
Customers	Increase customer base & products and services	This objective is set to increase customer base & products and services
Customers	Provide quality & innovative customer service	This objective is set to provide quality & innovative customer service
Finance	Maximize revenues & returns from core and new business	This objective is set to maximize revenues & returns from core & new businesses EDITED X3

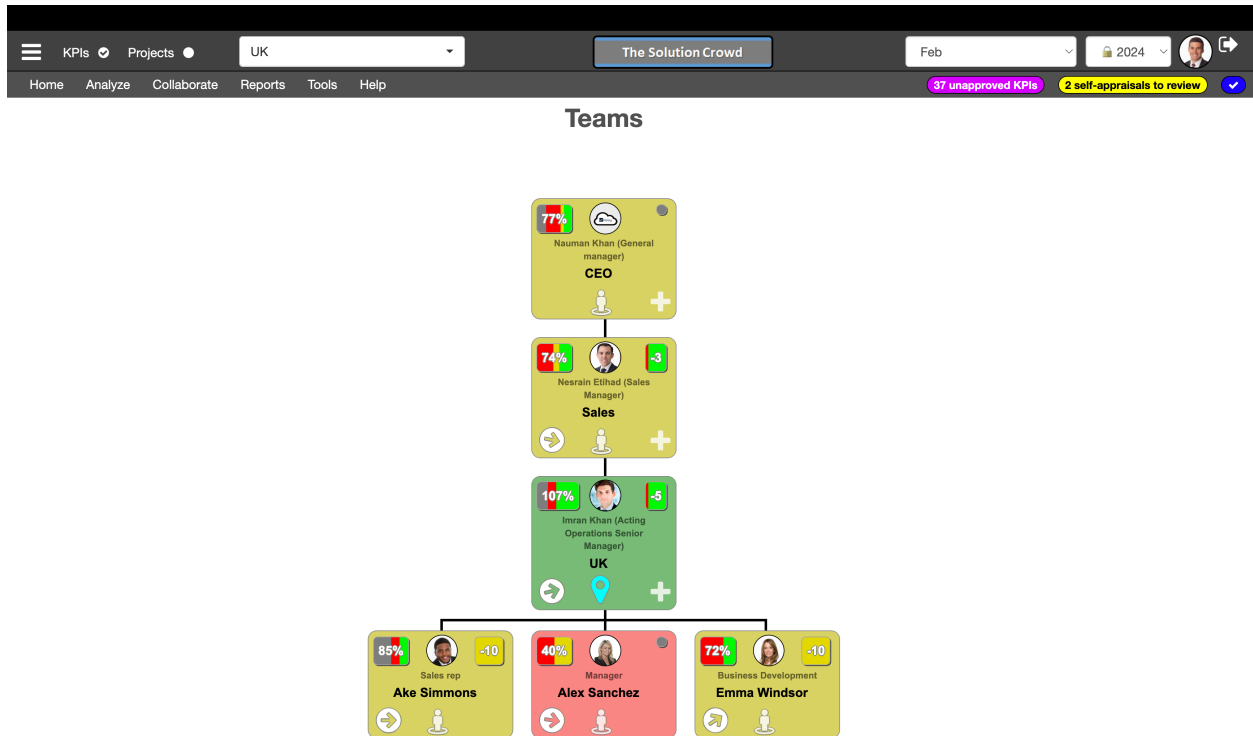
# Teams



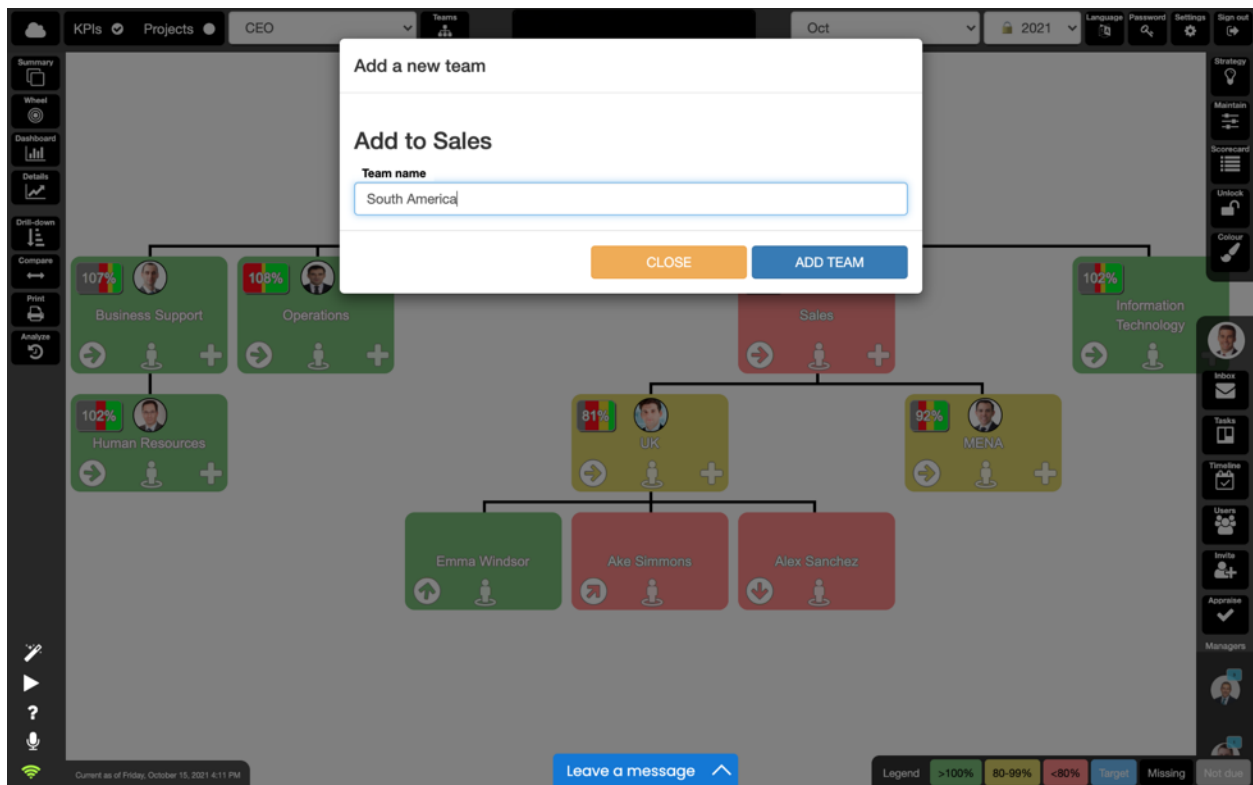
The team structure is created hierarchically by either the Admin adding sub-teams to a team or a Manager adding Employees to a team.

Double-click on the team boxes in the structure to collapse/expand each portion of the tree. Hold shift and scroll your mouse wheel for slow zoom in and out.

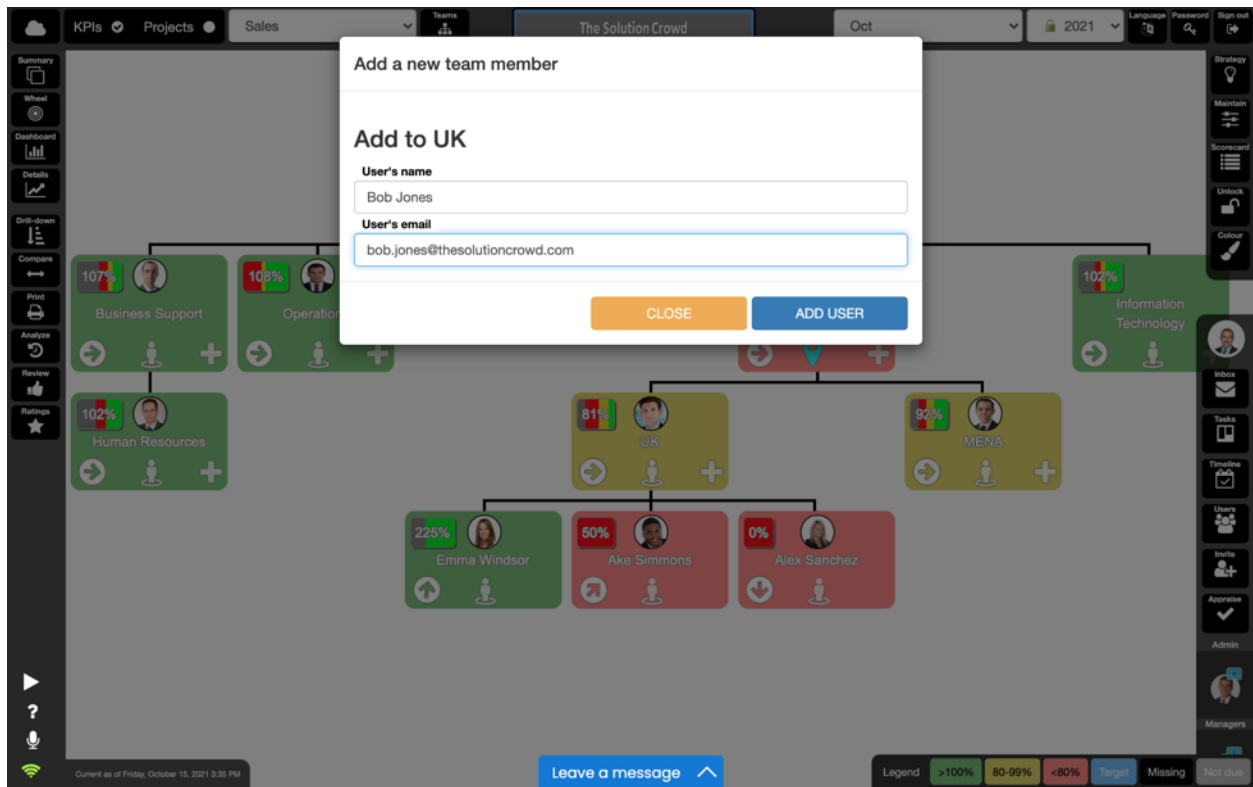
Use the “Follow me?” option in User profile to simplify the displayed teams hierarchy to only how the ancestors and direct children of the selected team.



Add teams and people directly to the hierarchy.

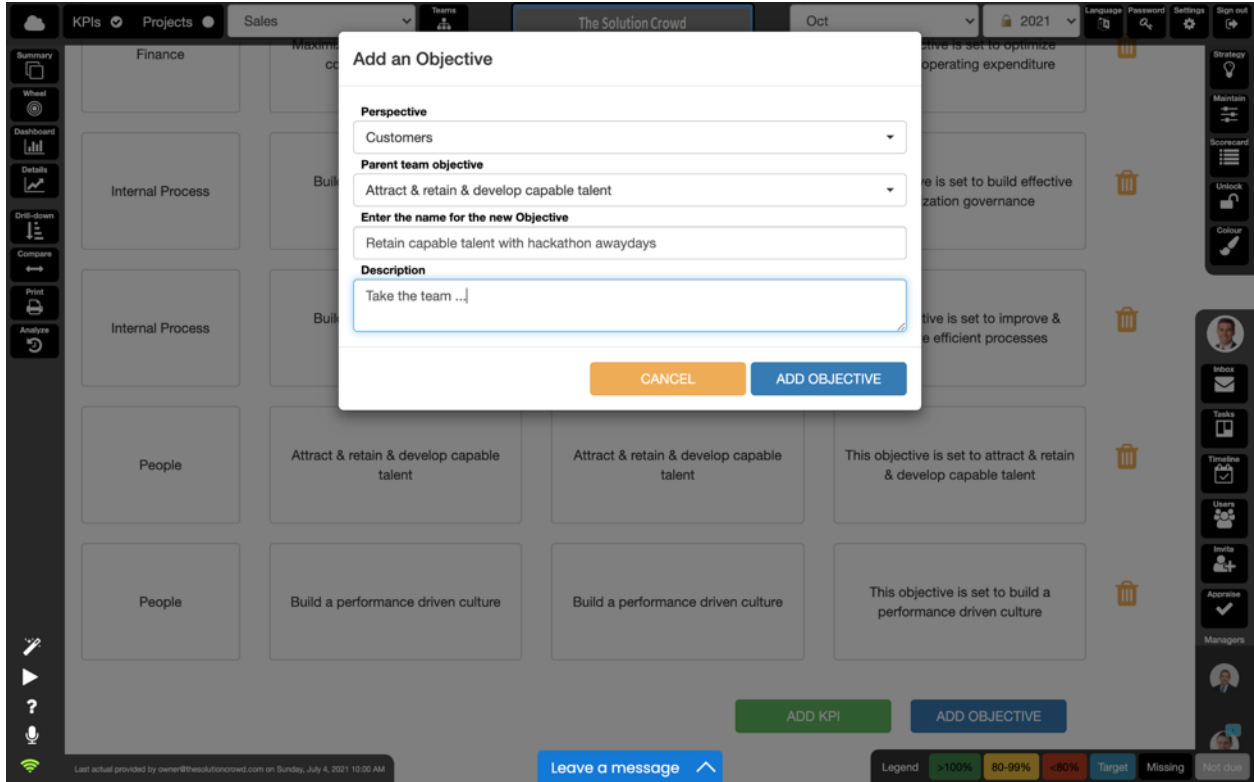






## Objectives

Then, each team can create local objectives and KPIs that are linked to the objectives of the parent team/department they are part of.



Cascade objectives vertically down your organisation and create local objectives.



# AI (Artificial Intelligence)

## AI Suggested KPIs/KRs

View A.I. suggested KPIs and OKRs for each strategic objective.

**KPI Suggestions**  
**Team CEO**  
**Perspective People**  
**Objective Attract retain & develop capable talent**

Status	Approved?	Name	Description	Unit	Direction	Add KPI?
Saved	Approved	# of employees on sick leave	Desc	Employee	Decrease is better	
Saved	Approved	% Employees Turnover	To keep Company manpower stable by retaining good performing employees. This % include voluntary and non-voluntary terminations.	%	Decrease is better	
Saved	Approved	Average training hours per FTE	To enable upskilling and continuous improvement of the workforce, regular training and development initiatives are crucial.	Hour	Increase is better	
Saved	Unapproved	Grads recruited		# of hires	Increase is better	
Saved	Unapproved	Total area rented out	This is the Desc	m2	Increase is better	
Suggested	Unapproved	Employee Engagement Score <a href="#">🔗</a>	Percentage of employees who report feeling engaged and committed to their work <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Time to Fill Positions <a href="#">🔗</a>	Average time it takes to fill open positions <a href="#">🔗</a>	days <a href="#">🔗</a>	Decrease is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Internal Promotion Rate <a href="#">🔗</a>	Percentage of employees who are promoted from within the organization <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Training Effectiveness <a href="#">🔗</a>	Percentage of employees who report that training programs have improved their skills and performance <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Diversity Index <a href="#">🔗</a>	Percentage of employees from diverse backgrounds, including gender, race, and ethnicity <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Employee Net Promoter Score (eNPS) <a href="#">🔗</a>	Percentage of employees who are willing to recommend the organization as a great place to work <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Leadership Effectiveness <a href="#">🔗</a>	Percentage of employees who rate their immediate supervisor as effective in their role <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>
Suggested	Unapproved	Career Development Score <a href="#">🔗</a>	Percentage of employees who report feeling that the organization supports their career development <a href="#">🔗</a>	% <a href="#">🔗</a>	Increase is better <a href="#">🔗</a>	<a href="#">Add</a>

**Hints**

e.g. These KPIs are for a Sales team in the manufacturing industry. The currency is dollars. Make the descriptions longer. etc.

[Suggest](#) [Back](#)

**Help**

1. Click Suggest button to retrieve suggestions.
2. Click on blue pencil icon to edit suggestions.
3. Click on green Add button to add as an unapproved KPI to this team.
4. Enter hints (optional) to influence suggestions.
5. The green rows show the existing KPIs for this team.
6. Please note, suggestions may take 30 seconds to load.
7. Click Back to return to the previous page.

Suggestions based on your existing strategy definition and any free-text hints provided.

Edit and save in situ.

## AI Suggested Strategy Templates

Have A.I. suggest objectives and KPIs/KRs based on your mission, vision and values.



### Edit team

#### CEO

**Vision**

To be the preferred trusted advisors for strategy, performance and KPI management

**Mission**

To empower our clients with innovative knowledge, tools, and technology to execute their strategies successfully

**Values**

Honesty | Innovation | Agility | Knowledge | Quality | Integrity | Leadership | Contribution

**Other info**

Award-winning UK based company.

[SAVE](#) [CANCEL](#)

[Need help?](#)

### Quick Set

Thinking of suggestions. Please wait. This may take about a minute. ✕

	Approved	Perspective *	Parent Team Objective	Objective *	Objective Description	KPI Name *	KPI Description	Unit	
1	<input type="checkbox"/>								

[SAVE](#) [CANCEL](#) [ADD ROW](#) [THINKING...](#)

[Need help?](#)



# Kippy – Features

**Quick Set**

	Approved	Perspective *	Parent Team Objective	Objective *	Objective Description	KPI Name *	KPI Description	Unit
1	<input type="checkbox"/>	Process ▾	▾	Improve Process Efficiency	Streamline processes to reduce cycle times and improve overall efficiency.	Cycle Time Reduction	Average time taken to complete a process cycle.	hours
2	<input type="checkbox"/>	Process ▾	▾	Improve Process Efficiency	Streamline processes to reduce cycle times and improve overall efficiency.	Process Error Rate	Percentage of errors occurring in processes.	percentage
3	<input type="checkbox"/>	Process ▾	▾	Enhance Quality Control	Implement rigorous quality checks to ensure high standards and reduce rework.	First Pass Yield	Percentage of products or services that meet quality standards without rework.	percentage
4	<input type="checkbox"/>	Process ▾	▾	Enhance Quality Control	Implement rigorous quality checks to ensure high standards and reduce rework.	Compliance Rate	Percentage of processes that comply with regulatory and internal standards.	percentage
5	<input type="checkbox"/>	Finance ▾	▾	Increase Revenue	Boost overall revenue through strategic initiatives and market expansion.	Revenue Growth	Increase in total revenue generated by the company.	Percentage
6	<input type="checkbox"/>	Finance ▾	▾	Increase Revenue	Boost overall revenue through strategic initiatives and market expansion.	Net Profit Margin	Percentage of revenue that remains as profit after all expenses are deducted.	Percentage
7	<input type="checkbox"/>	Finance ▾	▾	Optimize Costs	Reduce operational costs to improve overall financial efficiency.	Cost Reduction	Decrease in total operational costs.	Percentage
8	<input type="checkbox"/>	Finance ▾	▾	Optimize Costs	Reduce operational costs to improve overall financial efficiency.	Operating Expense Ratio	Ratio of operating expenses to total revenue.	Ratio
9	<input type="checkbox"/>	People ▾	▾	Enhance Employee Engagement	Increase the level of engagement and satisfaction among employees to foster a productive work environment.	Employee Satisfaction Rate	Percentage of employees who are satisfied with their job and work environment.	Percentage
10	<input type="checkbox"/>	People ▾	▾	Enhance Employee Engagement	Increase the level of engagement and satisfaction among employees to foster a productive work environment.	Employee Turnover Rate	Percentage of employees who leave the company over a given period.	Percentage
11	<input type="checkbox"/>	People ▾	▾	Foster Continuous Learning	Promote ongoing professional development and skill enhancement among employees.	Training Hours per Employee	Average number of training hours provided to each employee annually.	Hours
12	<input type="checkbox"/>	People ▾	▾	Foster Continuous Learning	Promote ongoing professional development and skill enhancement among employees.	Internal Promotion Rate	Percentage of job openings filled by internal candidates.	Percentage
13	<input type="checkbox"/>	Customers ▾	▾	Enhance Customer Experience	Improve the overall experience for customers to ensure they are satisfied and loyal.	Customer Satisfaction Score	Measures the overall satisfaction of customers with the company's services.	Percentage
14	<input type="checkbox"/>	Customers ▾	▾	Enhance Customer Experience	Improve the overall experience for customers to ensure they are satisfied and loyal.	Net Promoter Score (NPS)	Assesses the likelihood of customers recommending the company's services to others.	Score

[Need help?](#)

Tweak, approve and delegate for an instant strategy implementation.

# KPIs

Each employee in a team is then given individual objectives and KPIs that can be different, but must be aligned to the corporate objectives.

The screenshot shows the 'Maintain' interface for a KPI. The breadcrumb trail is 'Customers | Provide quality & innovative customer service | Positive customer feedback'. The KPI configuration includes:

- Objective:** Provide quality & innovative customer service
- KPI Name:** Positive customer feedback
- Owner:** emma.windsor@thesolutioncrowd.c
- Direction:** Increase is better
- Weight:** 1x
- Unit:** (empty)
- Frequency:** Monthly
- Cumulative:** Yes

**Targets and actuals for 2021:**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Targets	2	2	2	2	2	2	2	2	2	2	2	2
Actuals	1	1	1	1	0	0	3	3	6	7		

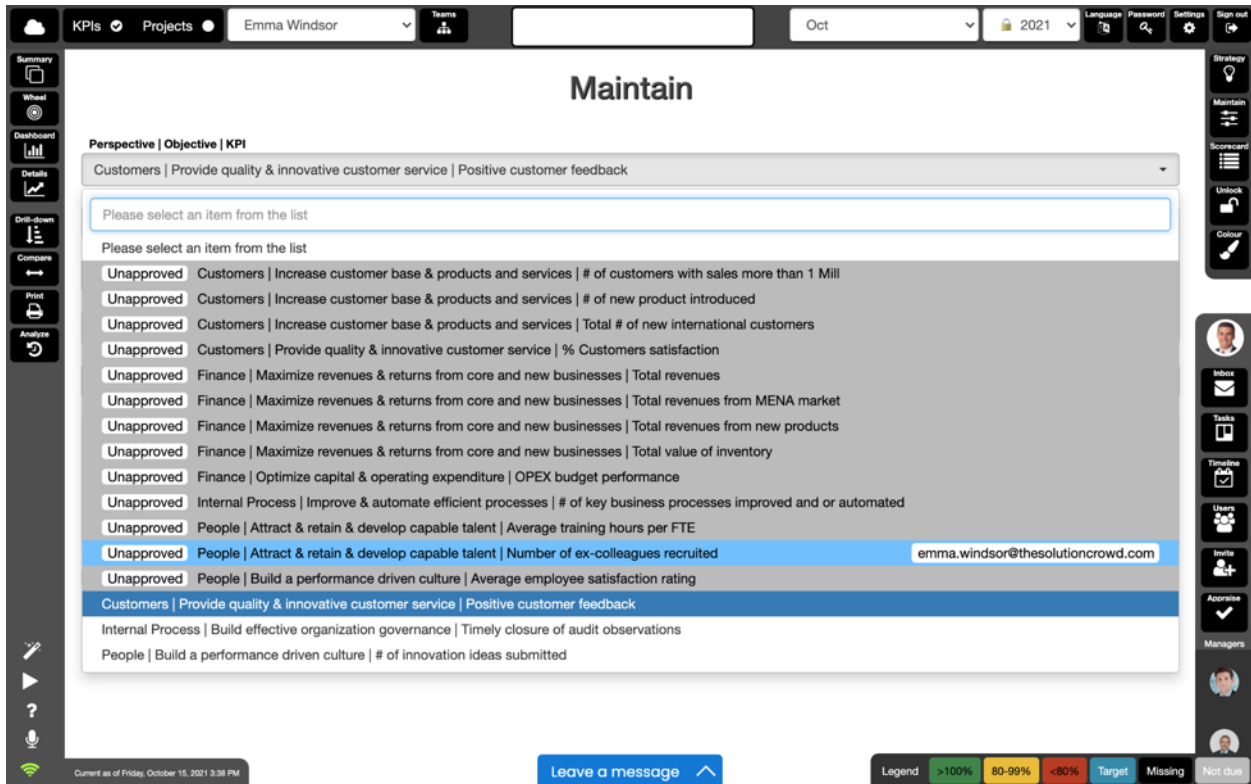
**KPI approval status:**  Approved

Buttons: CREATE NEW KPI (green), EDIT KPI (blue)

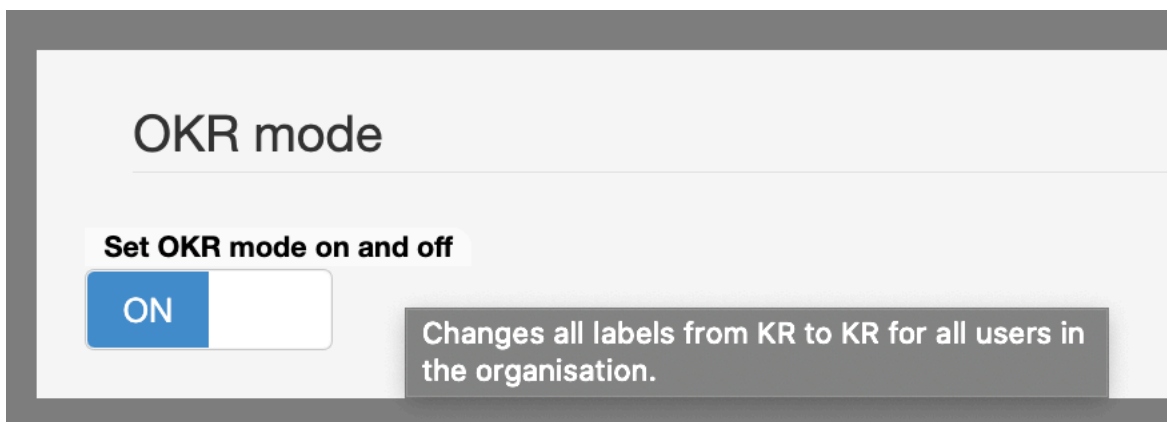
Legend: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), Not due (grey)

# OKRs

Employee's can propose individual objectives and KPIs. Whilst managers can also help define and review the proposals - before approving them.



## Full OKR mode



# Targets

Each KPI must be SMART and is therefore given a target to be measured at a predefined frequency (e.g. monthly, quarterly, semi-annual or annual).

The screenshot shows the 'Maintain' interface for a KPI. The top navigation bar includes 'KPIs', 'Projects', the user 'Emma Windsor', and a date selector for 'Oct 2021'. The main content area is titled 'Maintain' and contains the following fields:

- Objective:** Improve & automate efficient processes
- KPI Name:** Number of passed builds
- Owner:** emma.windsor@thesolutioncrowd.c
- Direction:** Increase is better
- Weight:** 1x
- Unit:** (empty)
- Frequency:** Quarterly
- Cumulative:** Yes
- Description:** (empty text area)
- Formula:** (empty text area)
- Data Source:** (empty text area)

Below these fields is a table titled 'Targets and actuals for 2021':

Month	Q1	Q2	Q3	Q4
Targets	25	50	100	
Actuals	40	49		

At the bottom, there is a 'KPI approval status' section with an 'Approved' checkbox, a 'CANCEL' button, and a 'SAVE NEW KPI' button. A legend at the bottom right shows color-coded performance ranges: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).



# Updating Actuals

## KPI Owner UI

The actual progress of each KPI can be provided by a variety of mechanisms.

- It can be provided directly by the employee in the kippy interface

The screenshot displays the Kippy Scorecard interface for user Emma Windsor. The interface is organized into several sections: Perspectives, Customers, Finance, Internal Process, and People. Each section contains a KPI card with a name, direction, weight, frequency, unit, cumulative target, actual value, and score. A table below the sections provides a detailed view of the KPIs.

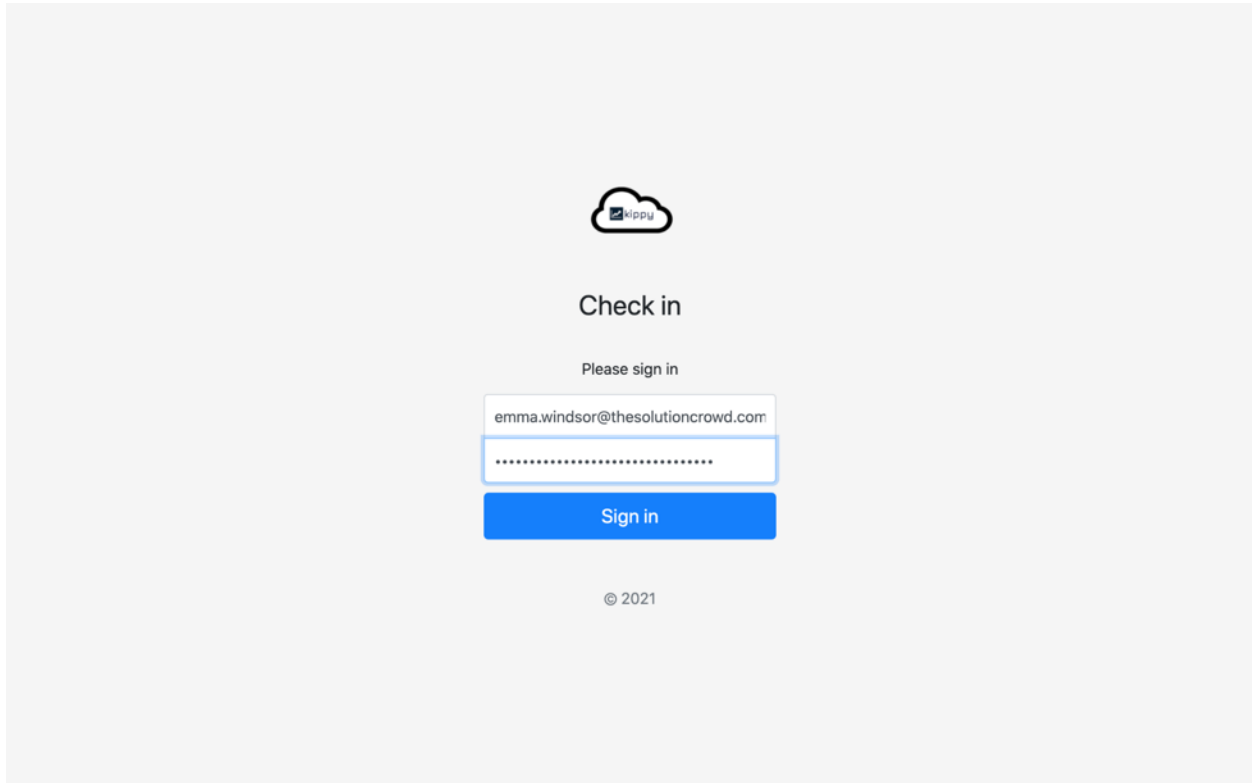
KPI Name	Direction	Weight	Frequency	Unit	Cumulative	Target	Actual	Score
Positive customer feedback	Increase	1x	Monthly		Yes	2	7	350%
Timely closure of audit observations	Increase	1x	Monthly		Yes	100	100	100%

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (White)



## Check-in microapp

- It can be provided by the employee in an standalone express “check-in” microapp





### My KPIs

Positive customer feedback  
(350%)

7 / 2

Emma Windsor  
Customers

Provide quality & innovative customer service

Update

Timely closure of audit observations (100%)

100 / 100

Emma Windsor  
Internal Process

Build effective organization governance

Update

# of innovation ideas submitted

? / 3

Emma Windsor  
People

Build a performance driven culture

Update

### Summary

Team	Perspective	Objective	KPI	Unit	Target	Actual	Score
Emma Windsor	Customers	Provide quality & innovative customer service	Positive customer feedback	2	7	350	
Emma Windsor	Internal Process	Build effective organization governance	Timely closure of audit observations	100	100	100	
Emma Windsor	People	Build a performance driven culture	# of innovation ideas submitted	3			

### KPI details

Positive customer feedback (350%)

7 / 2

Emma Windsor  
Customers

Provide quality & innovative customer service

Increase is better | 1x | Monthly | Cummulative

Submit new actual

Actual

7

Save

Cancel



The check-in microapp will display different ‘widgets’ for input of the actual, based on the Unit of the KPI.

The KPI below has a Unit of Completed.

The screenshot shows a KPI card for 'Hold town hall event (100%)' with a green header. The card content includes: 'Completed Yes', 'STM Process', 'Strengthen Cross Functional Working', and 'Increase is better | 1x | Monthly | Cumulative last updated 25 second ago'. A dialog box titled 'Submit new actual' is open, showing radio buttons for 'Not Completed' and 'Completed' (which is selected). Below the radio buttons are 'Save' and 'Cancel' buttons.

The KPI below has a Unit of OKR. There are also widgets for RAG and achieved.

The screenshot shows a KPI card for 'Hold town hall event (100%)' with a green header. The card content includes: 'OKR 1', 'STM Process', 'Strengthen Cross Functional Working', and 'Increase is better | 1x | Monthly | Cumulative last updated 9 second ago'. A dialog box titled 'Submit new actual' is open, featuring a progress scale from 0.0 to 1.0. The scale has color-coded segments: red (0.0-0.3), yellow (0.4-0.6), and green (0.7-1.0). Below the scale is a text input field containing the number '1'. Below the input field are 'Save' and 'Cancel' buttons.

# Maintain UI

- Actual can be provided directly by the manager

The screenshot shows the 'Maintain' interface for a KPI. The top navigation bar includes 'KPIs', 'Projects', 'Emma Windsor', 'Oct', and '2021'. The main content area is titled 'Maintain' and contains the following fields:

- Perspective | Objective | KPI:** Customers | Provide quality & innovative customer service | Positive customer feedback
- Objective:** Provide quality & innovative customer service
- KPI Name:** Positive customer feedback
- Owner:** emma.windsor@thesolutioncrowd.c
- Direction:** Increase is better
- Weight:** 1x
- Unit:** (empty)
- Frequency:** Monthly
- Cumulative:** Yes
- Description:** (empty text area)
- Formula:** (empty text area)
- Data Source:** (empty text area)

**Targets and actuals for 2021**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Targets	2	2	2	2	2	2	2	2	2	2	2	2
Actuals	1	1	1	1	0	0	3	3	6	7		

**KPI approval status**  
 Approved

Buttons: CANCEL (orange), SAVE KPI (green)

Bottom bar: Leave a message (blue), Legend: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), Not due (grey)



## Built-in adapters

- Actual can be pulled in from an external system (e.g. a sales/productivity/ERP system).

### Formula

```
=cloud.kippy.tfs.actualTestEffort
```

### Data Source

TFS



## Web APIs

- Actual can be pushed from external systems using kippy's web APIs e.g.

<https://kippy-tsc.appspot.com/api/v3/actual/?organisation=<org>&username=<username>&password=<password>&year=<year>&period=<period>&board=<boardName>&name=<name>&value=<value>>

and pulled out again

<https://kippy-tsc.appspot.com/api/v3/projects/?organisation=<org>>  
<https://kippy-tsc.appspot.com/api/v3/projects/scores/?organisation=<org>>  
<https://kippy-tsc.appspot.com/api/v3/kpis/?organisation=<org>>  
<https://kippy-tsc.appspot.com/api/v3/kpis/scores/?organisation=<org>>

```
← → ↻ ⓘ view-source:https://kippy-tsc.appspot.com/api/v2/projects/?username= [redacted]
1 {
2   "projects": [
3     {
4       "department": "Strategy Development",
5       "dimension": "Shareholder Value",
6       "objective": "Manage the Project Pipeline",
7       "initiative": "Projects Development",
8       "weight": "1x",
9       "owner": "[redacted]",
10      "year": "2019"
11    },
12    {
13      "department": "Strategy Development",
14      "dimension": "Operations",
15      "objective": "Improve Operational excellence",
16      "initiative": "Strategy \u0026 Corp Development",
17      "weight": "2x",
18      "owner": "[redacted]",
19      "year": "2019"
20    },
21    {
22      "department": "CEO",
23      "dimension": "Process",
24      "objective": "Build effective organization governance",
25      "initiative": "Install Kippy",
26      "weight": "1x",
27      "year": "2019"
28    },
29    {
30      "department": "Business Support",
31      "dimension": "Operations",
32      "objective": "Improve Operational excellence",
33      "initiative": "HR Improvements Project",
34      "weight": "2x",
35      "owner": "[redacted]",
36      "year": "2019"
37    },
38  ]
39 }
```



## Formulas

- Actual can be auto-calculated using formulas (e.g. the percentage of two other KPIs).

### Formula

```
=cloud.kippy.percentage("Actual Test Effort", "Planned Test Effort")
```

The in-built formulas include divide, multiply, add, subtract, percentage, min, max, abs and average.

Also, the copy function can be used to make the Actual the same as the Actual for another KPI from the same or different Team. (e.g. copy the 'items sold' KPI from the Sales team).

### Formula

```
=cloud.kippy.copy("Sales", "Items Sold")
```

The children formula can be used to sum the actual all KPIs with the name *kpiName* in the current team's direct sub-teams (i.e. one level below) e.g. =cloud.kippy.children.sum("*kpiName*")





If the kpiName is not provided, then the name of the current KPI will be used e.g.  
=cloud.kippy.children.sum()

Scores can also be manipulated with the following functions:

Function	Description
=cloud.kippy.score.top()	Restrict score to maximum of 100
=cloud.kippy.score.top(110)	Restrict score to a maximum value e.g. 110
=cloud.kippy.score.bottom()	Restrict score to minimum of 0
=cloud.kippy.score.bottom (10)	Restrict score to a minimum value e.g. 10
=cloud.kippy.score.range ( 20, 80 )	Restrict score to be within the range specified
=cloud.kippy.score.positive()	Absolute value e.g. -5 will be 5
=cloud.kippy.score.negative()	Absolute value multiplied by -1
=cloud.kippy.score.mid(20,90)	Set score as 0, 80 or 100 if below, between or above the two parameters

### Formula

```
=cloud.kippy.score.top()
```

## Metrics

Variables can be set to be used in formulas. Each variable is scoped per period but can be used in any team. Variables can be set via API calls. Changing the value of variable will automatically re-calculate all formulas that reference them.



## Formula variables ( Aug 2023 )

### Current variables

Variable	Value
total items sold	850
units produced	900

Filter variables

Close

### Add new variables

Enter new variables

A list of key value pairs e.g.  
Days of month=30  
Units produced=900

Add variables

Generated: Fri Aug 11 18:03:14 UTC 2023

The formula `=cloud.kippy.use("param1")` will use the actual value of the *param1* – where *param1* is either the name of KPI in the current team or the name of a metric variable.



# Reviewing actuals

## Manager UI

Each actual submission is reviewed by the manager for clarification, adjustment or clarification.

**Review**

**Users with KPIs due for review**

Bobby Blake (bob@thesolutioncrowd.com) 1 of 2 KPIs to review

**Sales | Finance | Maximize revenues & returns from core and new businesses | Total value of inventory**

Month	Actual (Mill \$)	Target (Mill \$)
Jan	300	500
Feb	400	600
Mar	500	700
Apr	600	800
May	700	800
Jun	800	800
Jul	900	900
Aug	900	900
Sep	1000	900
Oct	1100	1000
Nov	1200	1100
Dec	1300	1200

*Mill \$ : 1x : Increase is better : Cumulative : Bobby Blake*

**Operations | Internal Process | Improve & automate efficient processes | Man Hrs per Ton of production**

Month	Actual (Hour)	Target (Hour)
Jan	35	50
Feb	45	50
Mar	45	50
Apr	45	55
May	55	60
Jun	55	60
Jul	55	60
Aug	55	65
Sep	65	65
Oct	65	65
Nov	65	70
Dec	75	70

*Hour : 1x : Decrease is better : Cumulative : Bobby Blake*



The screenshot shows the Kippy dashboard interface. At the top, there is a navigation bar with 'Home', 'Analyze', 'Collaborate', 'Reports', 'Tools', and 'Help'. The main content area displays two KPI cards. The left card is titled 'Mill \$ : 1x : Increase is better : Cumulative : Bobby Blake'. It features a bar chart showing values for each month from Jan to Dec. Below the chart is a table with the following data:

Updated by	Last updated
Owen Turner	1 month ago
Reviewed by	Last reviewed
n/a	n/a
Current actual	Target
4	6
New Actual	

The right card is titled 'Hour : 1x : Decrease is better : Cumulative : Bobby Blake'. It also features a bar chart and a table with the following data:

Updated by	Last updated
Owen Turner	1 month ago
Reviewed by	Last reviewed
You	4 days ago
Current actual	Target
2	3
New Actual	

Both cards include an 'APPROVE' button at the bottom left and a minus sign icon at the bottom right. The dashboard also shows a notification bar at the top right with '1 Self appraisal to review' and '32 KPIs to review'.

Managers can quick approve with a single click, approve with notes, and adjust (with/without notes).



## Manager approval microapp

Managers can also review actuals with a standalone express “approval” microapp.

Manager

Please sign in

nauman.khan@thesolutioncrowd.com

Password

Sign in

© 2021

Kippy Sign out

### Individual KPIs

2021 > Oct

Search

Name	# KPIs	# Pending	Last submission
<a href="#">Ake Simmons</a>	1	1	08-Oct-2021
<a href="#">Alex Sanchez</a>	1	1	08-Oct-2021
<a href="#">Emma Windsor</a>	4	2	08-Oct-2021

Generated: Fri Oct 15 14:56:17 UTC 2021



## Employee KPI Review

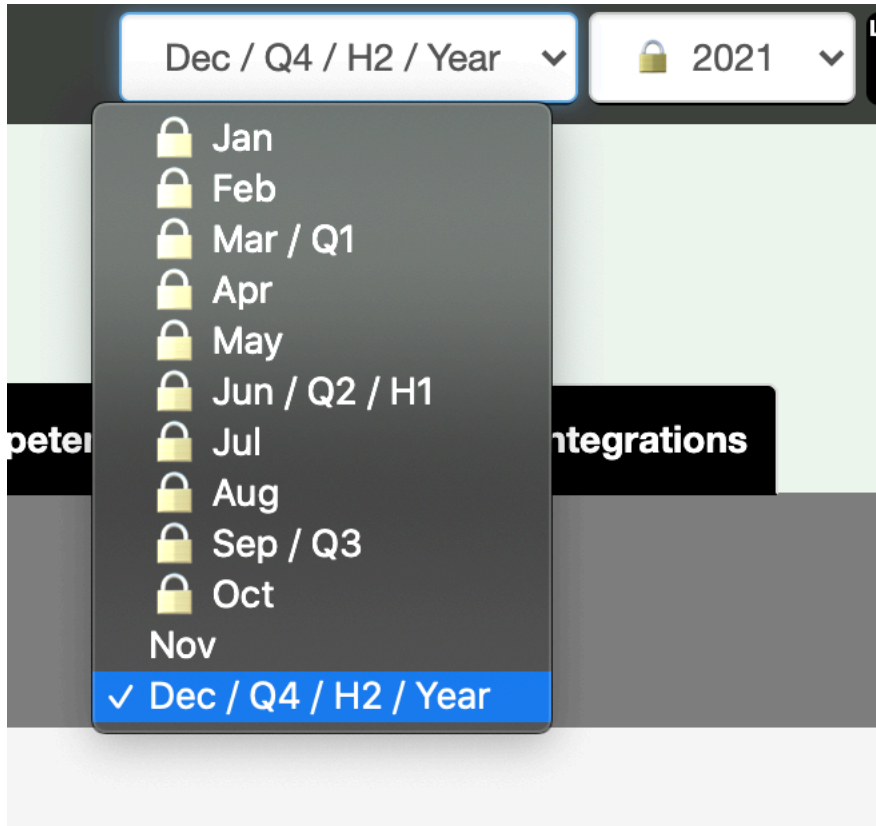
[2021](#) > [Oct](#) > Emma Windsor

KPI Name	Frequency	Forecast	Actual	Score	Last submission	Approval
<a href="#">Number of ex-colleagues recruited</a>	Monthly	3	2	67	08-Oct-2021	Not needed
<a href="#"># of innovation ideas submitted</a>	Monthly				08-Oct-2021	Not submitted
<a href="#">Positive customer feedback</a>	Monthly	2	7	350	08-Oct-2021	<a href="#">Approve</a>
<a href="#">Timely closure of audit observations</a>	Monthly	100	100	100	08-Oct-2021	Not needed

Generated: Fri Oct 15 14:57:22 UTC 2021

# History

Review historical organisation performance by going back to previous months and years.





# Chat and wiki

Clarifications can take the form of in-context chat conversations, with attachments of files, images, videos, etc. with a full audit trail.

The screenshot displays the Kippy dashboard for a KPI titled "Awareness has spread". The interface includes a left sidebar with navigation options like Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, and Analyze. The main content area is divided into several sections:

- Perspective | Objective | KPI:** Customers | Increase customer base & products and services | Awareness has spread
- Details:** Perspective (Customers), Objective (Increase customer base & products and services), KPI Name (Awareness has spread), Owner (sari@thesolutioncrowd.com), Direction (Increase is better), Weight (1x), Frequency (Quarterly), Cumulative (Yes), Unit (10), and Data Source.
- KPI Targets and Actuals graph:** A line and bar chart showing performance from Q1 to Q4. The Y-axis ranges from 0 to 1000. The bars represent actuals, and the line represents targets.
- KPI Targets and Actuals table:**

Month	Q1	Q2	Q3	Q4
Targets	500	700	800	950
Actuals	400	450	500	650
%	80	64	62	68
- History:** A list of notes, including one from "nauman.khan@thesolutioncrowd.com" dated "16-Feb-2021" with the text "Needs to be reviewed Jun 2021 at the next board meeting" and a PDF attachment.
- Chat Interface:** A "New note for Oct 2021" section with a rich text editor and a "File attached" placeholder.

At the bottom, there is a "Leave a message" button and a legend for performance indicators: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).





# Kippy – Features

**Insert File**

Select from files  
Choose file | No file chosen

File URL

INSERT FILE

**KPI Dashboard:**

Perspective | Objective | KPI  
Customers | Increase customer base & products and services

**Details**

Perspective: Customers  
Objective: Increase customer base & products and services

KPI Name: Awareness has spread

Owner: sari@thesolutioncrowd.com

Direction: Increase is better | Weight: 1x

Frequency: Quarterly | Cumulative: Yes

Unit: 10

Data Source:

**KPI Targets and Actuals table**

Month	Q1	Q2	Q3	Q4
Targets	500	700	800	950
Actuals	400	450	500	650
%	80	64	62	68

10 : 1x : Increase is better : Cumulative : sari@thesolutioncrowd.com

**History:**

**Audit Log**

nauman.khan@thesolutioncrowd.com  
Task deleted for 2021 period 2 on team CEO for Awareness has spread  
Saturday, September 25, 2021 4:33 PM


**New note for Oct 2021**

File attached


Legend: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey)

History


Audit Log




**nauman.khan@thesolutioncrowd.com**  
Task deleted for 2021 period 2 on team CEO for Awareness has spread  
Saturday, September 25, 2021 4:33 PM



**nauman.khan@thesolutioncrowd.com**  
Task added for 2021 period 9 on team CEO for Awareness has spread  
Saturday, September 25, 2021 4:33 PM



**nauman.khan@thesolutioncrowd.com**  
Task deleted for 2021 period 2 on team CEO for Awareness has spread  
Thursday, August 12, 2021 8:22 AM



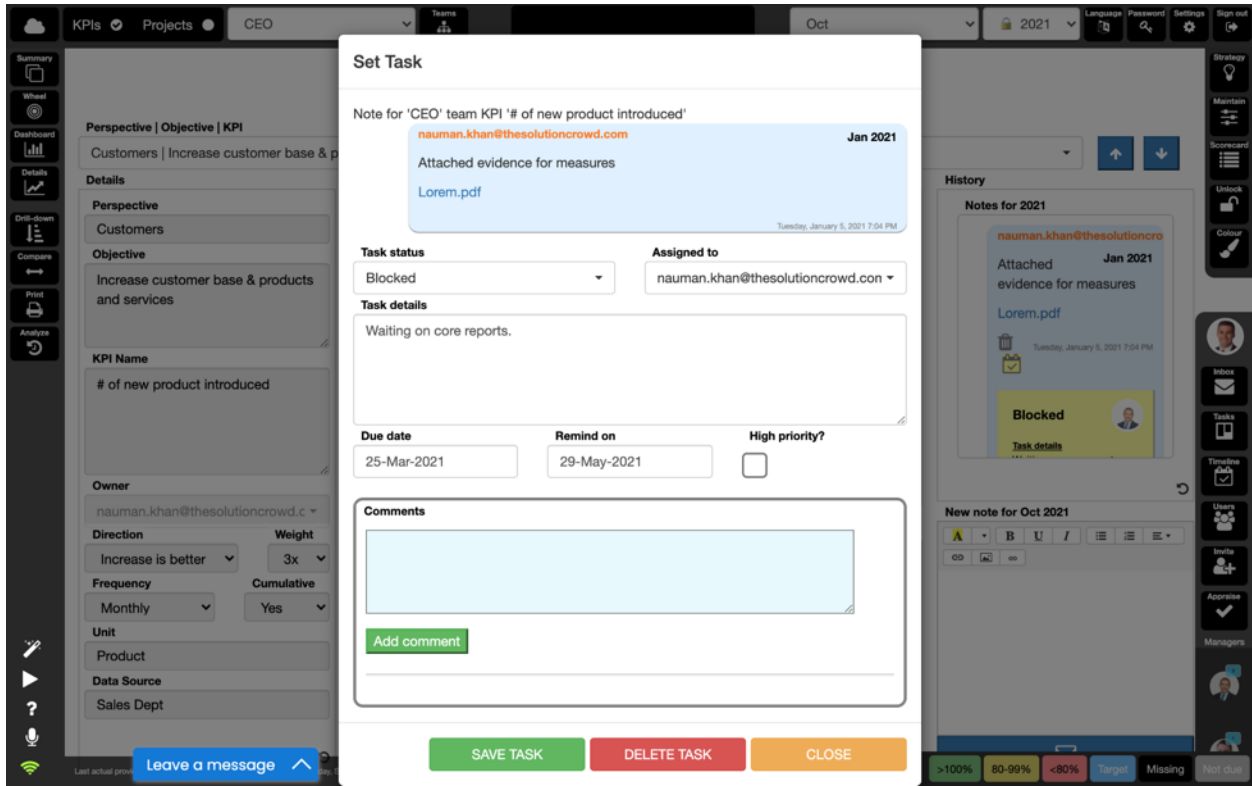
## Mentions

All conversations are emailed (or Slacked) to the involved users. Additional users can be 'mentioned' in a chat by simply adding their email address.

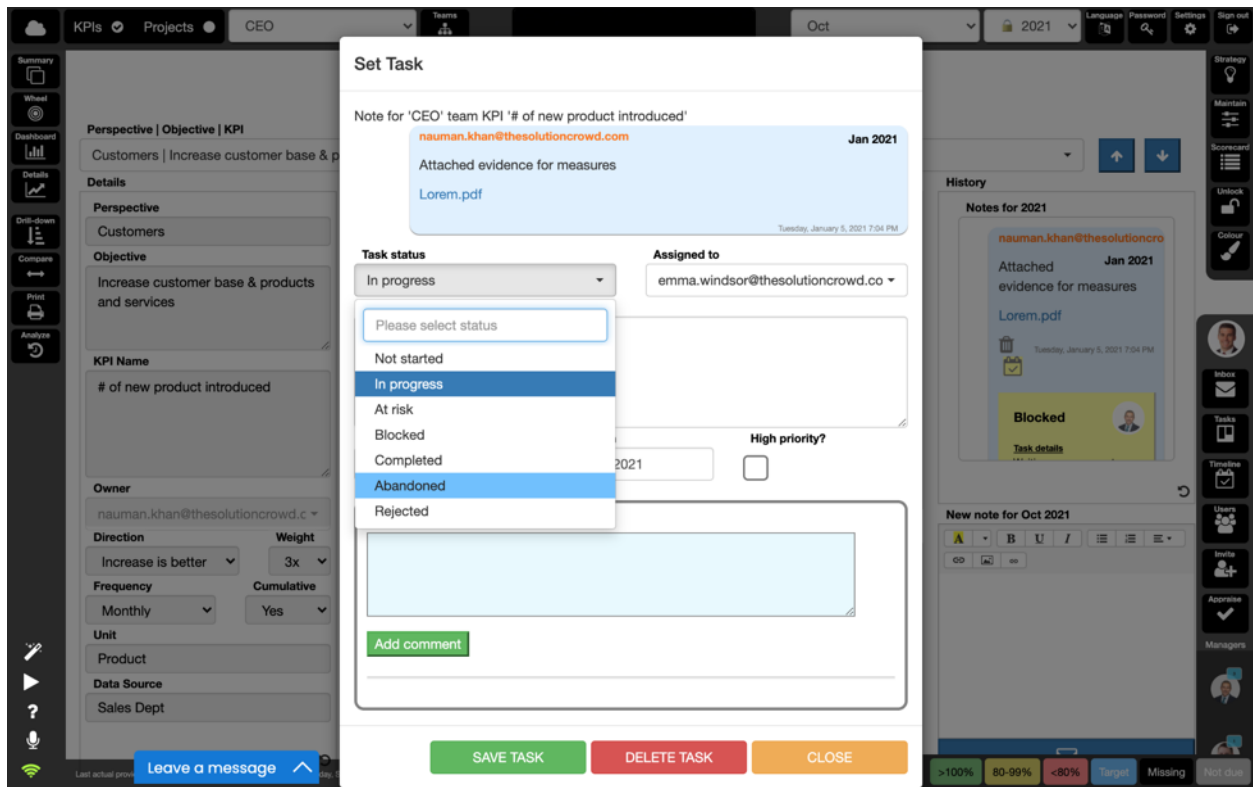
# Tasks

## Task setting

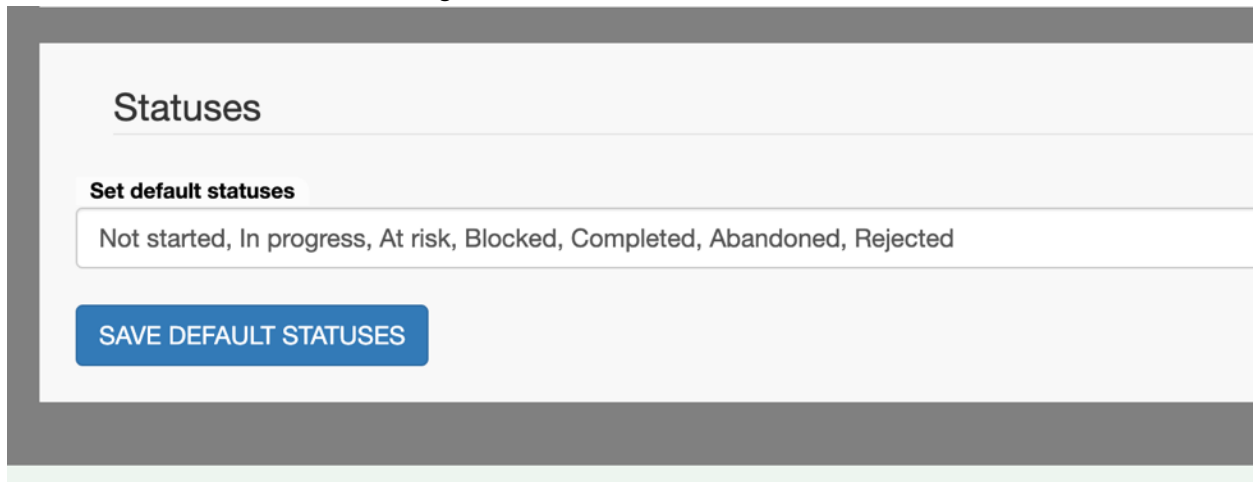
Each KPI can have tasks assigned which can be used to track OKRs, improvement activities and actions on other employees and managers.



These tasks can have deadlines, escalations, reminders and customized workflow.



The set of task statuses are configurable.



## Task viewing

All tasks are automatically presented in an Inbox, TimeLine and Kanban board for each user to help ensure they are actioned in a timely manner - with automated alerts when past due.

The screenshot displays the Kippy dashboard interface. At the top, there is a navigation bar with 'KPIs', 'Projects', and 'CEO' selected. The main content area is titled 'Inbox' and contains two task cards and two charts.

**Task 1:** From owner@thesolutioncrowd.com, dated Jun 2021. The message says 'Please tel why the Jul is red'.

**Task 2:** From owner@thesolutioncrowd.com, dated Jan 2021. The message says 'Test ....' and includes an 'In progress' status with a 'Task details' section.

**Chart 1: Total revenues from new products**  
Note for 'CEO' team KPI. Maximize revenues & returns from core and new business. MII \$ : 1x : Increase is better : Cumulative : alem.selimovic@thesolutioncrowd.com. The chart shows a line graph with blue circles and a bar chart with red bars for months Jan through Sep, and green bars for Oct through Dec.

**Chart 2: Customer Study Initiative**  
Note for 'CEO' team project. Provide quality & innovative customer service. owner@thesolutioncrowd.com : 1x : 26500.0(variance). The chart shows a bar chart with green bars for months Jan through Dec. A legend at the bottom indicates: >100% (yellow), 80-99% (orange), <80% (red), Target (blue), Missing (grey), Not due (grey).

Tasks can be drag and dropped to different statuses in the Tasks screen.



# Projects

As well as individual and team KPIs, employees can also be made responsible for milestones on key Projects.

**Project Details**

Perspective | Objective | Project  
Increase customer base & products and services | Expansion International Action Plan

**Details**

Perspective: Customers  
Objective: Increase customer base & products and services  
Project name: Expansion International Action Plan  
Programme: [Blank]  
Project Manager: imran.khan@thesolutio (Weight: 1x)  
Project Sponsor: nauman.khan@thesolutioncrowd.com  
Start Date: 12-Jan-2019, End Date: 09-Dec-2020  
Total Budget: 110000, Total Spent: 13500.0, Variance: 96500.0

**Project Targets and Actuals graph**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Targets	0	0	0	7	8	19	39	62	75	90	97	100
Actuals	0	0	0	0	1	20	21	43	62	75	97	100
var %	0	0	0	-7	-7	1	-18	-19	-13	-15	0	0

**Project Targets and Actuals table**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Targets	0	0	0	7	8	19	39	62	75	90	97	100
Actuals	0	0	0	0	1	20	21	43	62	75	97	100
var %	0	0	0	-7	-7	1	-18	-19	-13	-15	0	0

**History**

Notes for 2021

New note for Oct 2021

Legend: >0% (Green), 0 to -20% (Yellow), <-20% (Red), Target (Blue), Missing (Grey), Not due (Grey)



**Project Details**

Perspective | Objective | Project  
Increase customer base & products and services | Expansion International Action Plan

**Details**

**Perspective**  
Customers

**Objective**  
Increase customer base & products and services

**Project name**  
Expansion International Action Plan

**Programme**

**Project Manager**  
imran.khan@thesolutio - Weight: 1x

**Project Sponsor**  
nauman.khan@thesolutioncrowd.com

**Start Date**: 12-Jan-2019 | **End Date**: 09-Dec-2020

**Total Budget**: 110000 | **Total Spent**: 13500.0 | **Variance**: 96500.0

**Project Targets and Actuals graph**

**Expansion International Action Plan**

**Project Targets and Actuals table**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Targets</b>	0	0	0	7	8	19	39	62	75	90	97	100
<b>Actuals</b>	0	0	0	0	1	20	21	43	62	75	97	100
<b>var %</b>	0	0	0	-7	-7	1	-18	-19	-13	-15	0	0

**History**

Notes for 2021

New note for Oct 2021

Current as of Friday, October 15, 2021 4:08 PM

Legend: > 0% (Green), 0 to -20% (Yellow), < -20% (Red), Target (Blue), Missing (Grey), Not due (White)

**Maintain**

Perspective | Objective | Project  
Expansion International Action Plan

**Objective**  
Increase customer base & products and services

**Description**  
Increase Sales from the international market by Participating in Exhibitions , Regular & Potential customers visits, Explore stockist and suggest new products

**Risk**  
- Change import policies In USA (Foreign Laws and Regulations) - Slow economy all over the world

**Mitigation**  
New marketing channels include social media, web 2.0, email, mobile marketing, search and apps. These channels are notably of interest to executives in the US, China and Russia

**Milestone name**: Add more products | **Milestone description**: Add more products

**Milestone owner**: alern.selimovic@thesolutionc - **Milestone weight**: 1x | **Milestone start date**: 06-Jun-2019 | **Milestone end date**: 13-Aug-2020

**Targets and actuals for 2021**

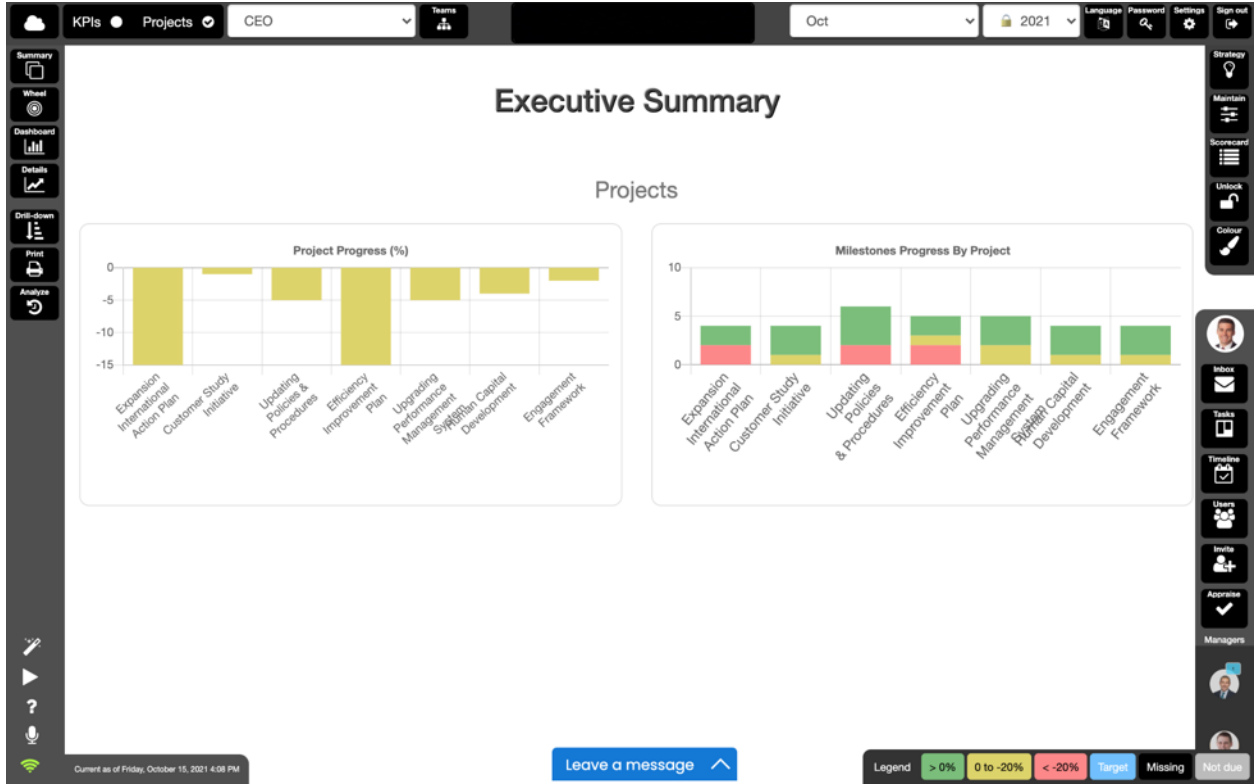
Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Targets</b>				55	66	77	88	99	100			
<b>Actuals</b>					6	10	15	50	60	100		

**Milestone name**: Explore stockist in europe and africa | **Milestone description**: Explore stockist in europe and africa

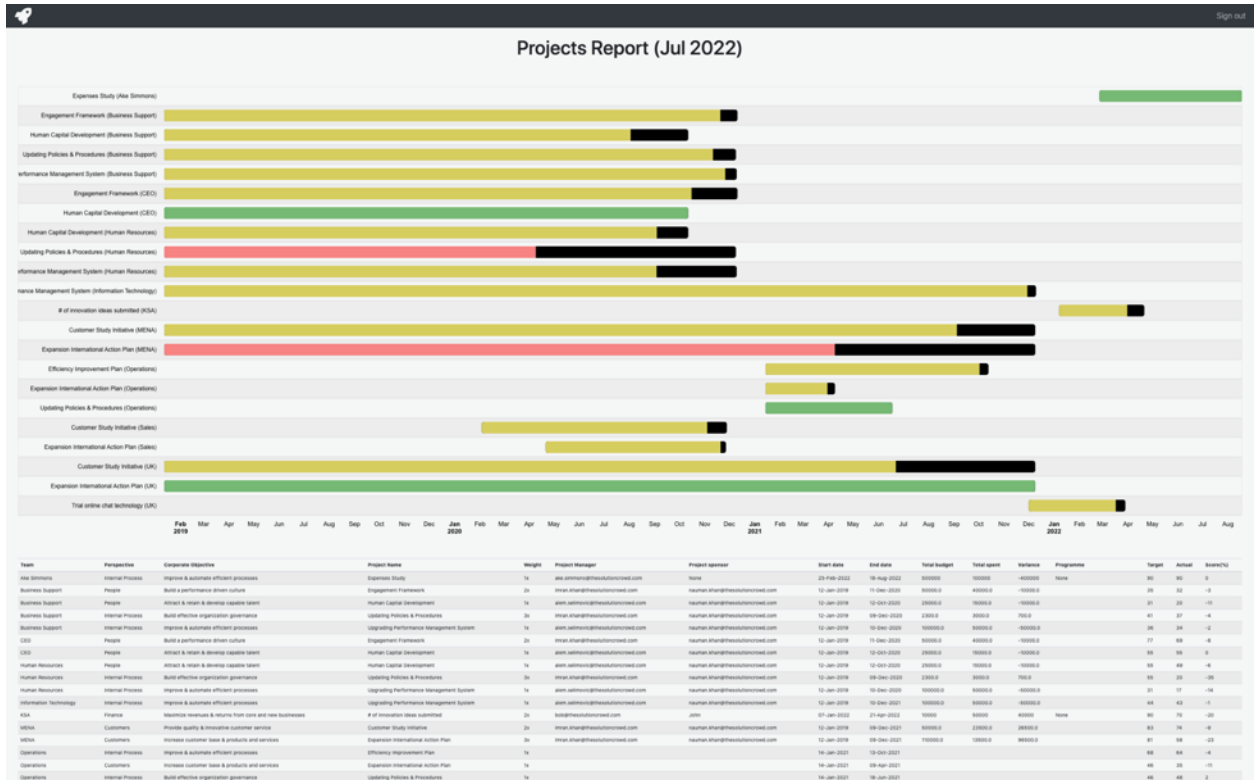
Current as of Friday, October 15, 2021 4:08 PM

Legend: > 0% (Green), 0 to -20% (Yellow), < -20% (Red), Target (Blue), Missing (Grey), Not due (White)





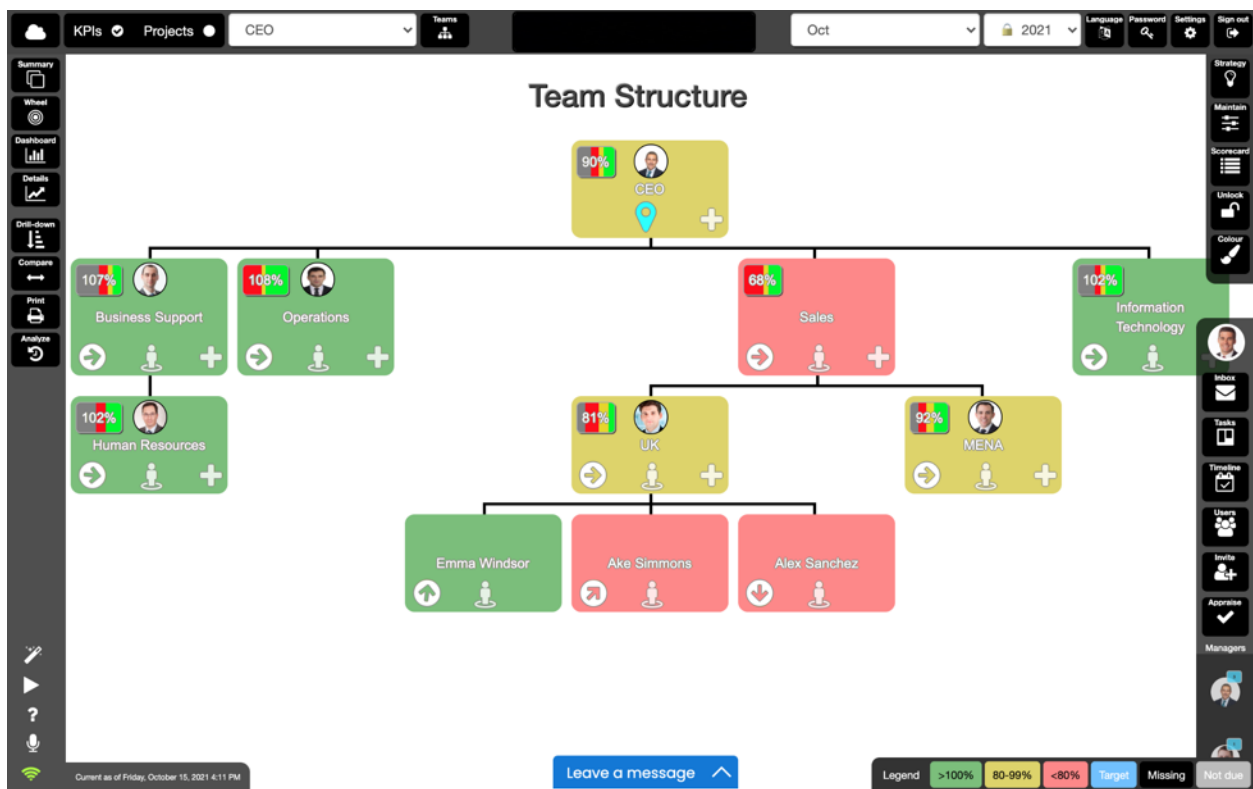
The Projects microapp summarizes all projects and project performance on a Gantt chart.

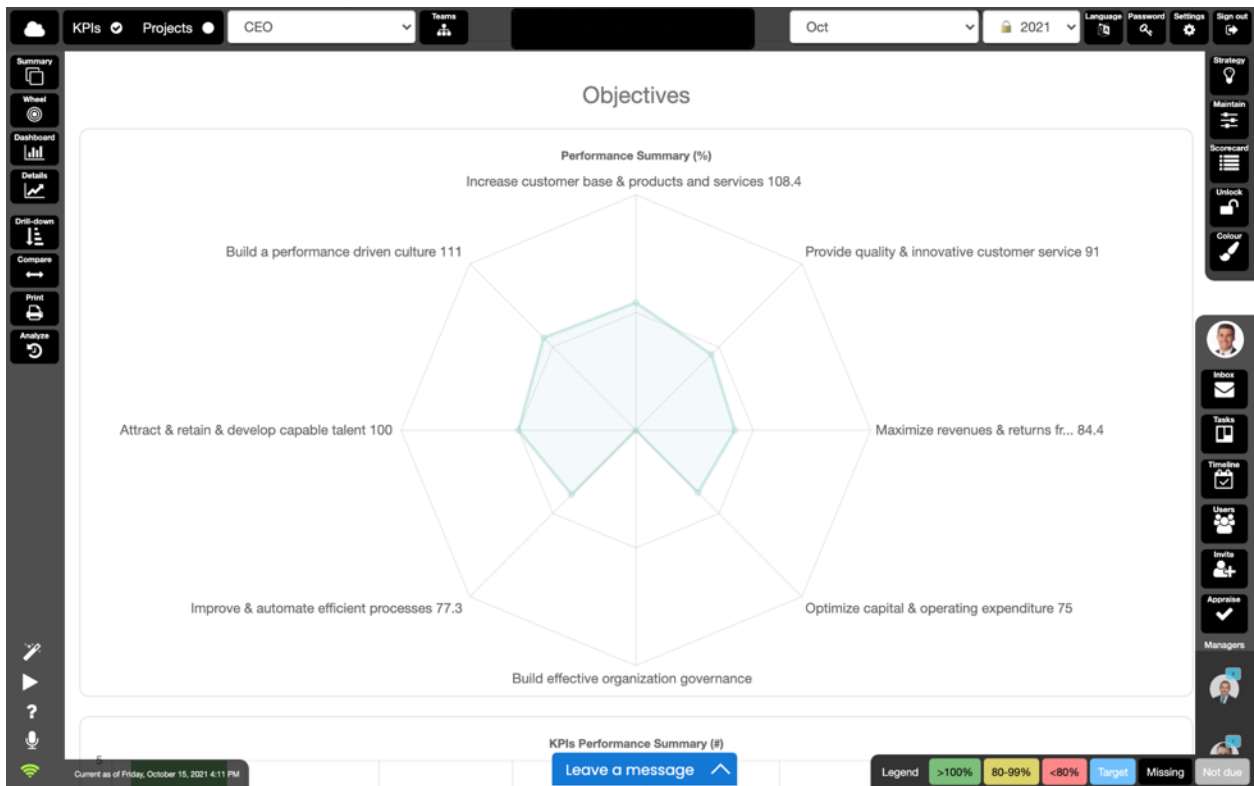
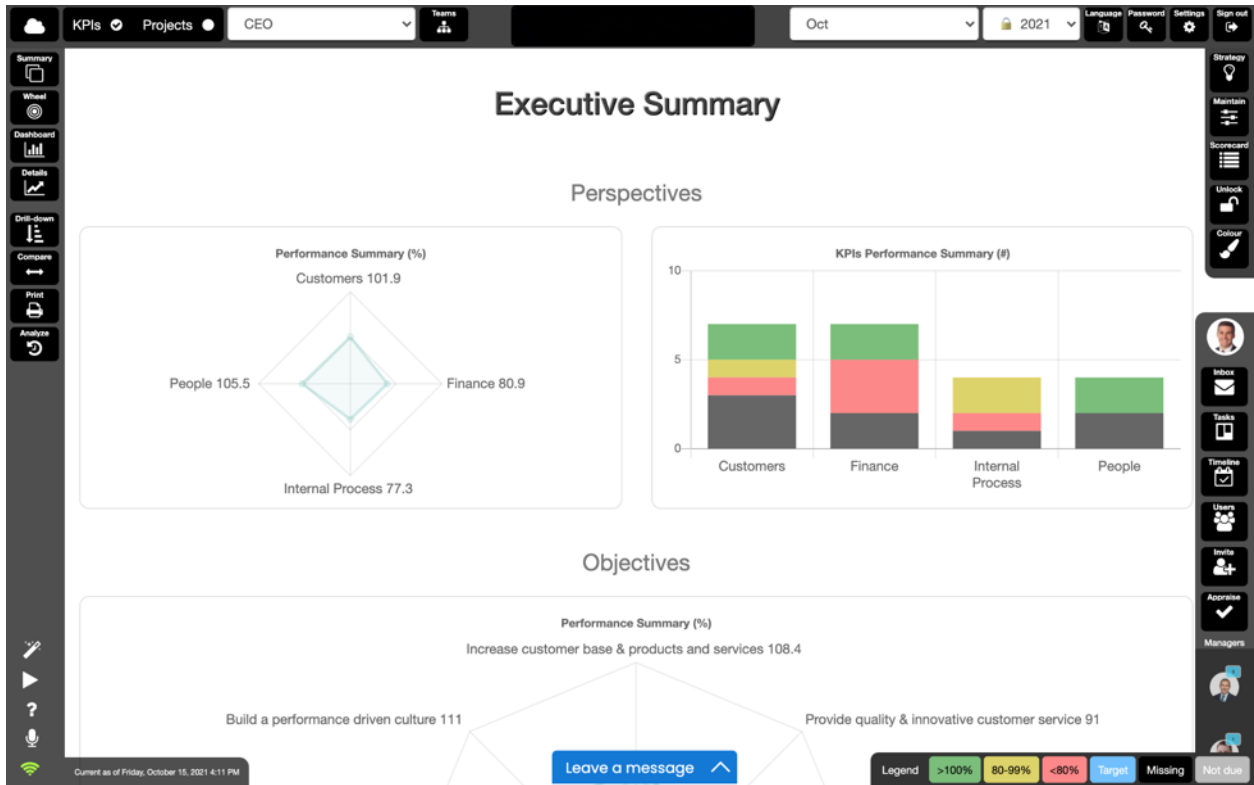


# Live dashboards

The progress of all this information is used to maintain live dashboards of performance across every dimension, including:

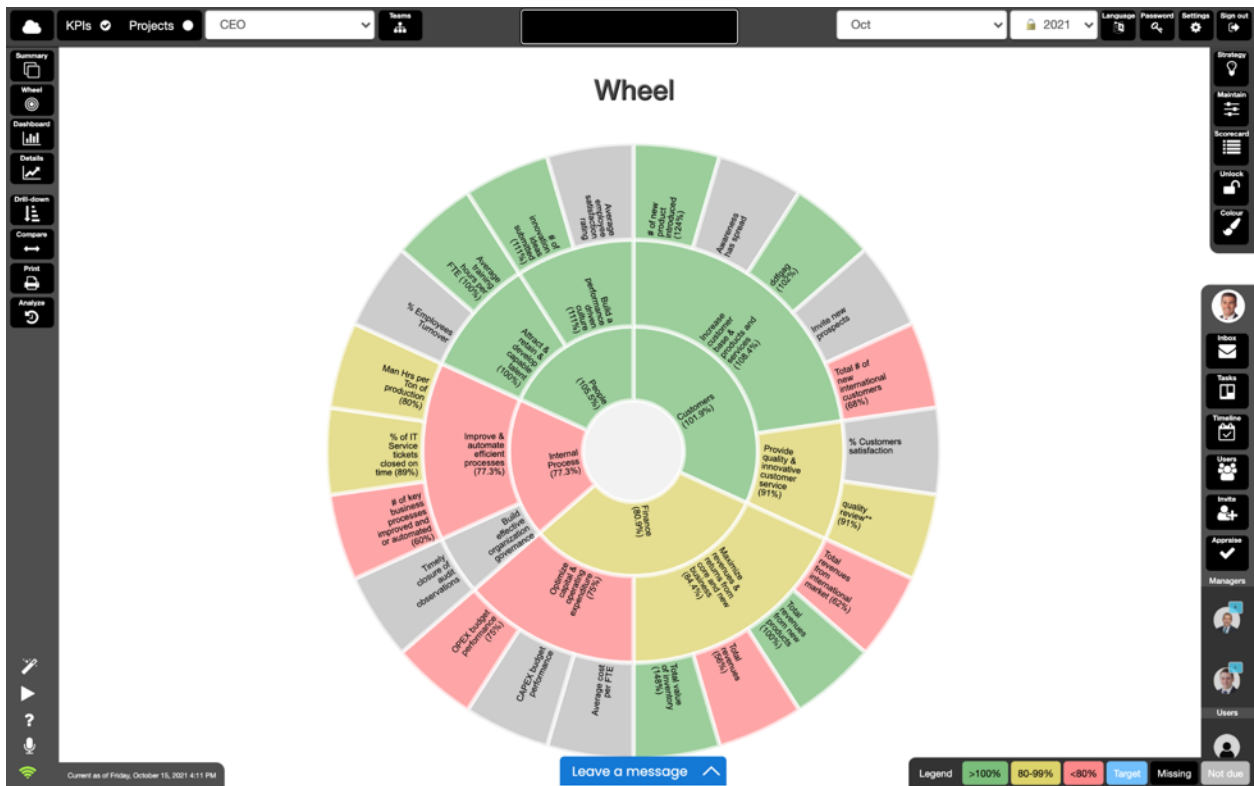
- By corporate performance
- By team
- By shared objective
- By project
- By employee
- And much, much more.

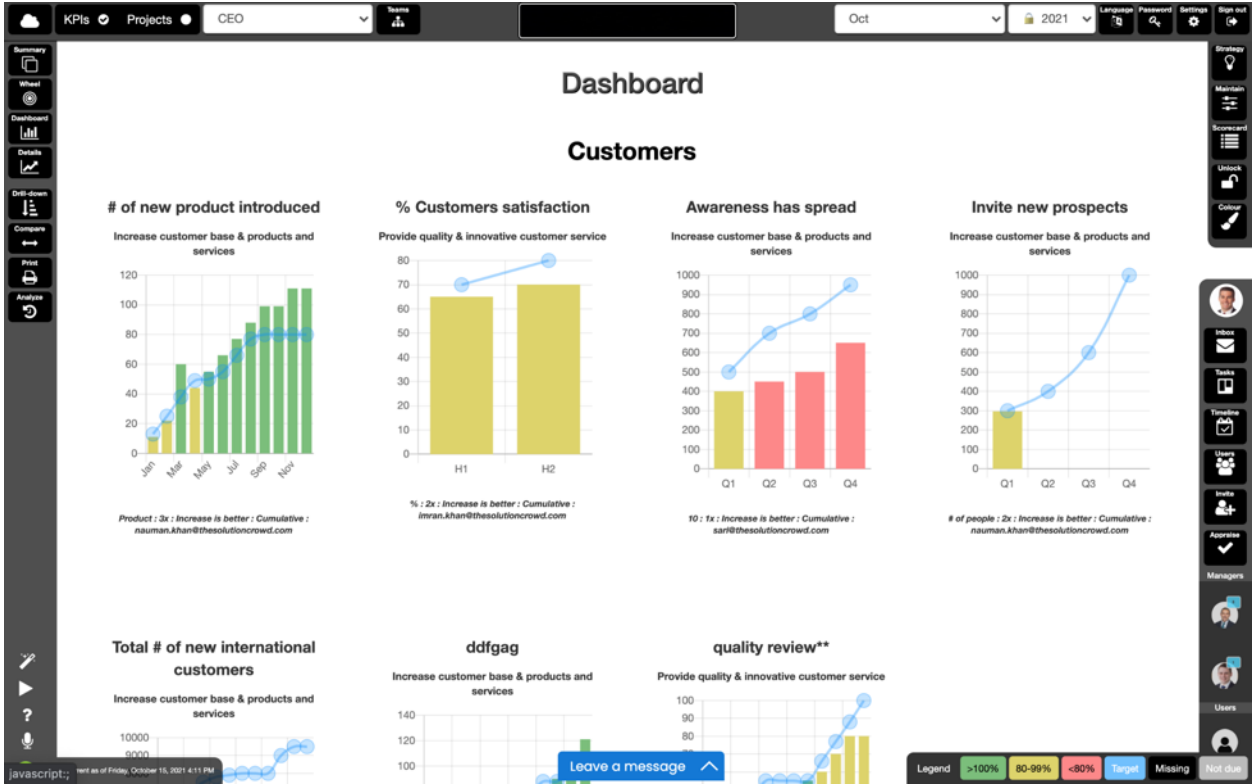






# Kippy – Features





### Compare

	CEO	Business Support	MENA	Operations	Information Technology	Human Resources	Sales	Ak
<b>Perspective Customers</b>	101.9%	⊙	101.5%	⊙	⊙	⊙	53.5%	
<b>Objective Increase customer base &amp; products and services</b>	108.4%	⊙	101.5%	⊙			42.3%	
<b>Objective Provide quality &amp; innovative customer service</b>	91%				⊙		87%	
<b>Perspective Finance</b>	80.9%	112%	80.3%	106%	100%	120%	63.2%	
<b>Objective Maximize revenues &amp; returns from core and new business</b>	84.4%	⊙	⊙	⊙	⊙	⊙	⊙	
<b>Objective Optimize capital &amp; operating expenditure</b>	75%	112%	112%	83.5%	100%	120%	100%	
<b>Perspective Internal Process</b>	77.3%	72%	100%	113%	84.5%	126%	57.6%	
<b>Objective Build effective organization governance</b>	⊙	⊙	⊙	79%	⊙	⊙	44.3%	
<b>Objective Improve &amp; automate efficient processes</b>	77.3%	72%	100%	130%	84.5%	126%	111%	
<b>Perspective People</b>	105.5%	136.5%	78.5%	108.7%	125%	83.8%	79.7%	
<b>Objective Attract &amp; retain &amp; develop capable talent</b>	100%	73%	75%	125%	125%	75%	75%	
<b>Objective Build a performance driven culture</b>	111%	200%	82%	100.5%	125%	86.7%	82%	

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (White)



**Detailed Scorecard**

Organisation	Team	For Year	For Period	Last refreshed
thesolutioncrowd.com	CEO	2021	Oct	Current as of Friday, October 15, 2021 4:11 PM

Vision	Mission	Values
Honoring our past by creating a future characterized by stimulated growth, development and the incessant practice of excellence in everything we do...	Delivering exceptional value to our customers through the engagement of our talented people, the application of best practice thinking in everything we do, the emphasis on quality and excellence and the focus on delivering superior performance that preserves our future ...	P – Proactive academic and personal integrity effective management operations lifelong learning among students, faculty, staff and the at large community respect for individuals in the community S – Service high quality service and efficiency positive interpersonal relationship among members of the community U – Upbeat academic environment that nurtures excellence in learning, teaching and research professional development and personal growth among members of the community

Perspective	Corporate Objective	KPI Name	Formula	Owner	Weight	Unit	Cumulative	Data source	Direction	Frequency	Target	Actual	Score (%)
Customers	Increase customer base & products and services	# of new product introduced	# of new product introduced (selling)	nauman.khan@thesolutioncrowd.com	3x	Product	Yes	Sales Dept	Increase is better	Monthly	80	99	124%
Customers	Increase customer base & products and services	Awareness has spread		sari@thesolutioncrowd.com	1x	10	Yes		Increase is better	Quarterly			
Customers	Increase customer base & products	ddfagag	Total # of customers with sales =>1 Mill	nauman.khan@thesolutioncrowd.com	1x	Customer	Yes	dfsDept	Increase is better	Monthly	88	90	102%

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not data (White)

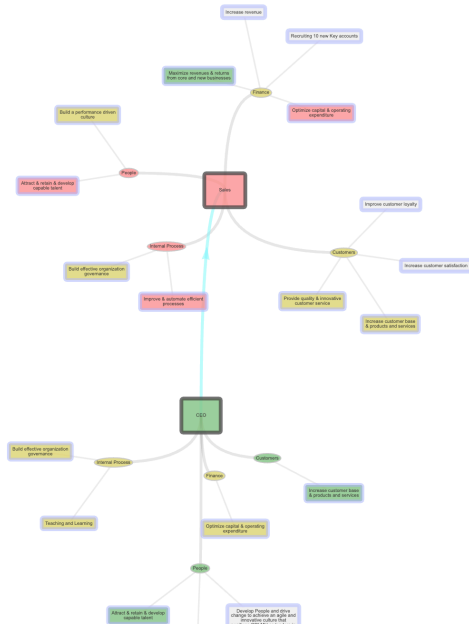
# Analyze

You can analyze your data by different dimensions.



Navigation bar with: Home, Analyze, Collaborate, Reports, Tools, Help. User: CEO, Organization: The Solution Crowd, Date: Jul 2024. Notification icons: 9, 1, 21, 84.

### Nodes



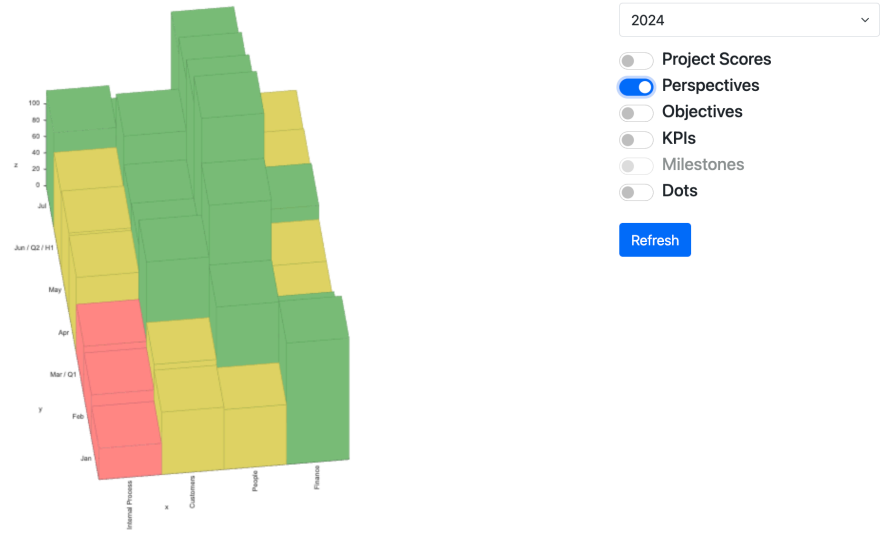
Filter sidebar with: Sales (dropdown), All perspectives (dropdown), 2024 - Jun / Q2 / H1 (dropdown). Filter categories: KPIs, Projects, Milestones, Users, Owners, Feedback, Competency, Ancestor teams (checked), Sub-teams, Org, Perspectives, Objectives, Teams (checked), Structured, Simplify. Font size: 16+. Buttons: Update, Help.

Interact, filter, drill-down and animate the nodes using your mouse. Hover over the filters to learn more.



Navigation bar with: KPIs, Projects, CEO (dropdown), The Solution Crowd, Jul, 2024, user profile, and notification icons (9, 1, 21, 84).

### Graphs

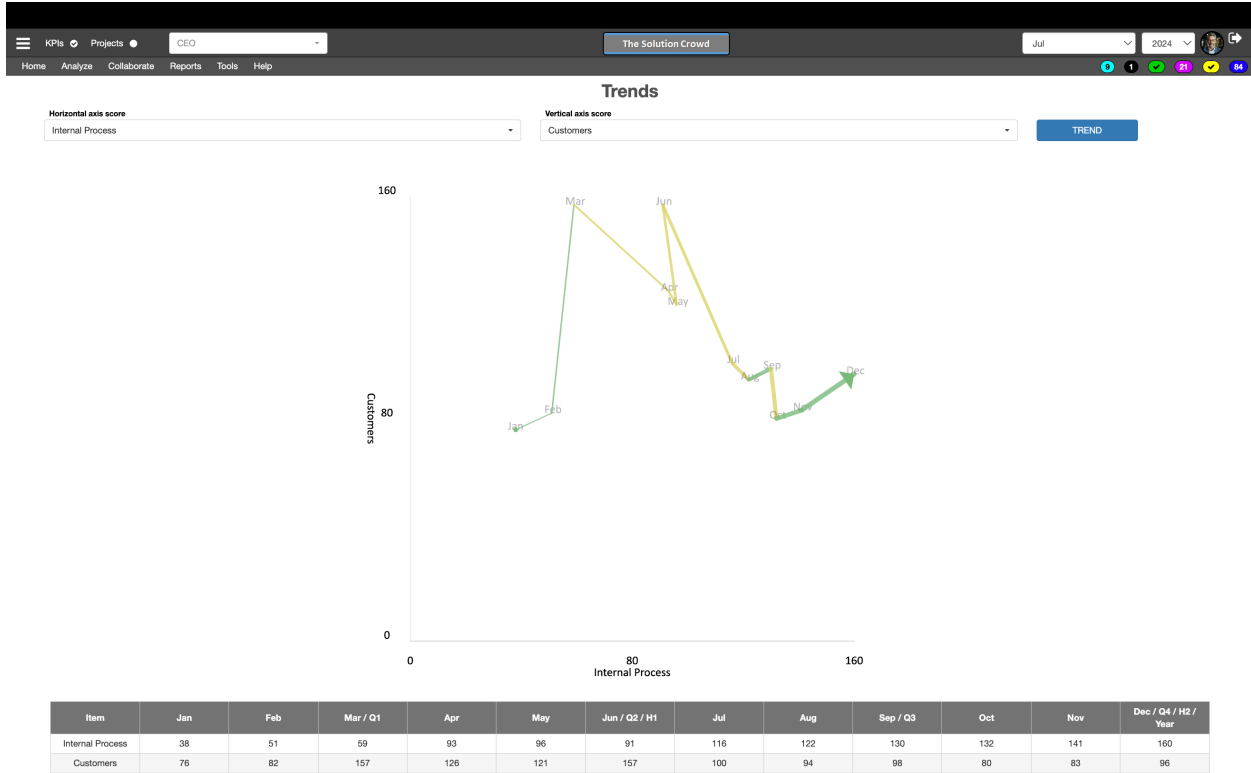


Drag with your mouse to change the perspective. Hover over the filters to learn more.





# Kippy – Features



Compare how two items are trending over the year.

**Drill Down**

Perspective | Objective: Customers | Increase customer base & products and services **108.4%**

**CEO**

KPI Name	Direction	Weight	Frequency	Unit	Cumulative	Target	Actual	Score
# of new product intro	Increase	3x	Monthly	Product	Yes	80	99	124%
Awareness has sp...	Increase	1x	Quarterly	10	Yes			
ddfgag	Increase	1x	Monthly	Customer	Yes	88	90	102%
Invite new prospects	Increase	2x	Quarterly	# of people	Yes			
Total # of new international customers	Increase	1x	Monthly	Customer	Yes	9000	6150	68%

**Sub-team: Business Support**

KPI Name	Direction	Weight	Frequency	Unit	Cumulative	Target	Actual	Score
Timely closure of audit observations	Increase	2x	Quarterly	%	Yes			

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey)

Check performance of your objective, by the vertical alignment of sub-objectives down the organisation.

	CEO	Operations	Sales	Human Resources
<b>Perspective Finance</b>	90.1%	89.8%	53.5%	
<b>Objective Maximize revenues &amp; returns from core and new business</b>	82.4%			
<b>KPI Total revenues from international market</b>	82%	50%		
<b>KPI Total revenues from new products</b>	136%	127%	129%	
<b>KPI Total revenues</b>	47%	41%	117%	
<b>KPI Total value of inventory</b>	100%	118%	111%	
<b>Objective Optimize capital &amp; operating expenditure</b>	103%	101.5%	-73%	
<b>KPI Average cost per FTE</b>				
<b>KPI CAPEX budget performance</b>		104%		
<b>KPI OPEX budget performance</b>	103%	99%	104%	
<b>Perspective Customers</b>	100.4%		78.5%	
<b>Objective Increase customer base &amp; products and services</b>	89%		69.3%	
<b>KPI Awareness has spread</b>				

Check the performance of your perspectives, objectives and KPIs horizontally across your organisation – filtering out columns on demand.

## Strategy map

View the org wide strategy on a strategy map.

The strategy map is available for the level 1 team and for any other team.

The strategy map shows the objective scores for the selected period and year.

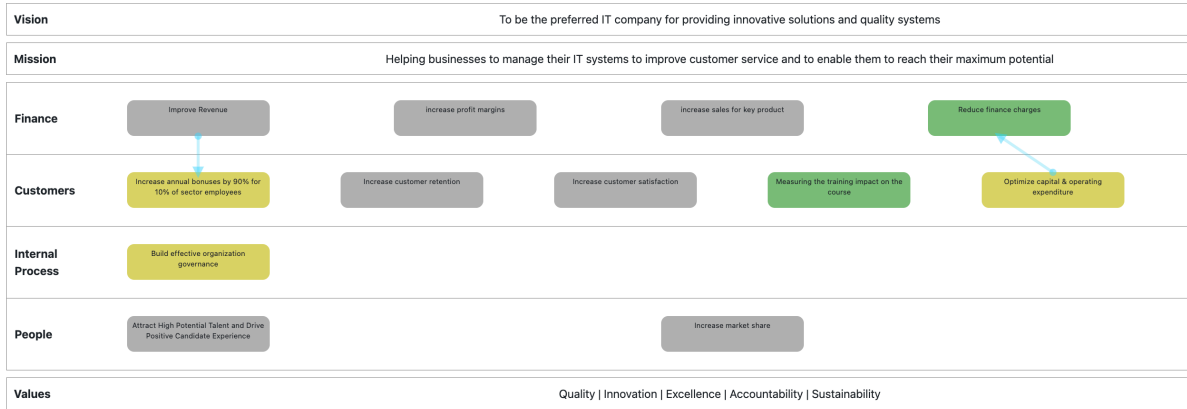
Links between objectives can be created with a simple drag-and-drop from one objective to another.



Links can also be given descriptions (by turning on objective link descriptions in Tools | Settings | Objectives).



### Strategy Map ( CEO - Apr 2024 )



#### Links

From	To
Improve Revenue	Increase annual bonuses by 90% for 10% of sector employees
Optimize capital & operating expenditure	Reduce finance charges

Hint: Drag and drop objectives on to each other to create links. Double-click links to remove them.

[Back](#)

Generated: Sat Apr 06 09:13:08 UTC 2024

## Work list

Quick links to action items for your attention.



In order, they are:

- Appraisals and self-appraisals for your review
- Review actual submissions
- Approve unapproved KPIs/OKRs
- Current period Checkins for your attention
- Previous period Checkins for your attention
- Your outstanding Tasks



Click on links to be taken directly to those screens. Hover to see description of each. The numbers indicate how many. Tick indicates none.

Shift-click on the ‘actuals to review’ and ‘unapproved KPIs’ to be taken to alternative screens.

### Individual KPIs

2023 > Aug

Search

User	# KPIs	# Pending	Last submission
<a href="#">Alem Selimovic (alem.selimovic@thesolutioncrowd.com)</a>	27	27	08-Aug-2023
<a href="#">Bobby Blake (bob@thesolutioncrowd.com)</a>	2	1	07-Aug-2023
<a href="#">Joe Mardesit (joe@thesolutioncrowd.com)</a>	5	5	07-Aug-2023
<a href="#">Owen Turner (owner@thesolutioncrowd.com)</a>	4	4	30-Jun-2023
<a href="#">Hi Jones (hi@thesolutioncrowd.com)</a>	5	5	29-Jun-2023
<a href="#">Mike Bowni (test@thesolutioncrowd.com)</a>	2	2	11-Jan-2023

Close

Generated: Fri Aug 11 17:59:32 UTC 2023



## Review KPIs

Alem Selimovic (alem.selimovic@thesolutioncrowd.com)

Search

Team	KPI Name	Frequency	Forecast	Actual	Score	Last submission	Approval
MENA	# of customers with sales more than 1 Mill	Monthly	13	9	69	16-May-2023	Approve
UK	# of customers with sales more than 1 Mill	Monthly	17	5	29	11-Jan-2023	Approve
CEO	# of innovation ideas submitted	Monthly	2	5	250	09-Jan-2023	Approve
Business Support	# of innovation ideas submitted	Monthly	30	20	67	09-Jan-2023	Approve
MENA	# of innovation ideas submitted	Monthly	3	8	267	11-Jan-2023	Approve
Information Technology	# of innovation ideas submitted	Monthly	5	5	100	07-Aug-2023	Approve
Human Resources	# of innovation ideas submitted	Monthly	13	15	115	09-Jan-2023	Approve
UK	# of innovation ideas submitted	Monthly	3	4	133	11-Jan-2023	Approve
MENA	# of new product introduced	Monthly	3	3	100	07-Aug-2023	Approve
UK	# of new product introduced	Monthly	3	5	167	11-Jan-2023	Approve
CEO	Capital expenditure ratio	Monthly	6	5	120	14-Jul-2023	Approve
CEO	Customer Acquisition Rate	Monthly	8	7	87	14-Jul-2023	Approve
CEO	Customer Churn Rate	Monthly	8	6	133	14-Jul-2023	Approve
CEO	Customer Lifetime Value (CLV)	Monthly	10000	9744	97	14-Jul-2023	Approve

Generated: Fri Aug 11 17:59:01 UTC 2023

## Approve Draft KPIs

Search

Approval	Edit	Delete	Team	Perspective Name	Objective Name	KPI Name	Frequency	Owner	Unit	Weight	Direction	Cumulative	Description	Formula	Data Source
Approve	Edit	Delete	KSA	Customers	Increase customer base & products and services	# of customers with sales more than 1 Mill	Monthly		Customer	2x	Increase is better	Yes	Includes all 1 Mill customers within the measured period. Sales are cumulative within one calendar year.	Total # of customers with sales =>1 Mill	Sales Dept.
Approve	Edit	Delete	Ake Simmons	Customers	Increase customer base & products and services	# of customers with sales more than 1 Mill	Monthly			1x	Increase is better	Yes			
Approve	Edit	Delete	KSA	People	Build a performance driven culture	# of innovation ideas submitted	Monthly		Idea	1x	Increase is better	Yes	To track (as a start) number of ideas submitted through Company innovation program at all levels	Total # of innovation ideas submitted & accepted	HR Dept.
Approve	Edit	Delete	KSA	Internal Process	Improve & automate efficient processes	# of key business processes improved and or automated	Monthly		Bus. Process	1x	Increase is better	Yes	In order to achieve operational excellence, Company needs to enhance and/or automate existing processes	Total # of business processes improved and/or automated	Quality Dept.

Generated: Fri Aug 11 17:59:58 UTC 2023



# Quick links

View info by from the lens of the org, person and team (by KPI, KR or project).

**Org Lens** ✕

| [Teams](#) | [Objectives](#) | [Users](#) | [HR report](#) | [Talent report](#) | [Risk report](#) |

## Org Report ( Jun 2023 )

Level	Parent team	Team name	KPI score	Project score
1		CEO	108.0	-15.0
2	CEO	Sales	144.0	-22.0
2	CEO	Business Support	183.0	-3.0
2	CEO	Operations	166.0	-1.0
2	CEO	Information Technology	1887.0	-27.0
3	Sales	UK	115.0	-23.0
3	Sales	MENA	93.0	-12.0
3	Business Support	Human Resources	82.0	3.0
3	Business Support	Business Support 1		
4	UK	Alex Sanchez	200.0	
4	UK	Ake Simmons	94.0	-40.0
4	UK	Emma Windsor	133.0	-60.0
4	MENA	KSA	108.0	0.0

[Print](#) [Download](#) [Details](#)

Generated: Mon Jun 19 10:02:57 UTC 2023



KPI Lens | CEO



| Annual | Sub-team KPIs | Drill-down KPIs | 9-Box |

Annual Team Report (CEO - 2023)

KPIs

Table with 17 columns: Perspective, Objective, KPI Name, Weight, Owner, Unit, Cumulative, Direction, Frequency, and 12 months (Jan-Dec). Rows include metrics like '# of employees on sick leave', '# of innovation ideas submitted', and '% of new product introduced'.

Staff Lens | Nauman Khan (nauman.khan@thesolutioncrowd.com)



| Acknowledge | KPIs | Annual | 9Box | Review KPIs |

Review KPIs

Nauman Khan (nauman.khan@thesolutioncrowd.com)

Search

Table with 8 columns: Team, KPI Name, Frequency, Forecast, Actual, Score, Last submission, Approval. Rows list various KPIs like '# of new product introduced', '% of customer left', and 'Invite new prospects'.



Sub-team Report  
(CEO - 2023)

Projects and milestones

Engagement Framework		Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Improve HR Infrastructure and Policy Capacity	Engagement Framework	2x	Imran Khan	Nauman Khan	12-Jan-2019	11-Dec-2020	5 / 8 (-3)	16 / 18 (0)	28 / 20 (8)	33 / 38 (-5)	34 / 40 (-6)	35 / 67 (-32)	54 / 73 (-19)	70 / 80 (-10)	77 / 87 (-10)	85 / 93 (-8)	95 / 97 (-2)	100 / 100 (0)
Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Develop and endorse the engagement action plan	1x	Alem Selimovic	22-Feb-2019	29-Apr-2020	5 / 0 (5)	15 / 10 (5)	70 / 20 (50)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)			
Follow up and modify accordingly	3x	Alem Selimovic	06-Jun-2019	13-Dec-2020	0 / 0 (0)	0 / 0 (0)	0 / 0 (0)	0 / 0 (0)	0 / 0 (0)	0 / 50 (-50)	25 / 60 (-35)	50 / 70 (-20)	60 / 80 (-20)	70 / 90 (-20)	90 / 95 (-5)	100 / 100 (0)			
Implement the action plan	1x	Imran Khan	29-Apr-2019	06-Nov-2020	0 / 0 (0)	0 / 0 (0)	0 / 0 (0)	0 / 30 (-30)	5 / 40 (-35)	10 / 50 (-40)	50 / 60 (-10)	70 / 70 (0)	80 / 80 (0)	100 / 90 (10)	100 / 100 (0)	100 / 100 (0)			
Review requirements for the action plan	1x	Imran Khan	15-Jan-2019	22-Feb-2020	25 / 50 (-25)	90 / 100 (-10)	95 / 100 (-5)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)			

Expansion International Action Plan		Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Finance	Improve Working Capital	Expansion International Action Plan	1x	Imran Khan	Nauman Khan	12-Jan-2019	09-Dec-2020	1 / 1 (0)	1 / 1 (0)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)
Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Explore stockist in europe and africa	3x	Nauman Khan	29-Apr-2019	06-Nov-2020	1 / 1 (0)	1 / 1 (0)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)	2 / 1 (1)			

Human Capital Development		Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Build Leadership capacity and Increase Team effectiveness	Human Capital Development	1x	Alem Selimovic	Nauman Khan	12-Jan-2019	12-Oct-2020	8 / 13 (-5)	26 / 28 (-2)	33 / 31 (2)	36 / 44 (-8)	59 / 53 (6)	68 / 66 (2)	85 / 81 (4)	93 / 85 (8)	100 / 89 (11)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)
Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Review and update the HR policy	1x	Imran Khan	15-Jan-2019	22-Feb-2020	25 / 50 (-25)	90 / 100 (-10)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)	100 / 100 (0)			

See Quick Links video for full demo of all screens.

# Staff performance

The individual performance summary of each employee shows the live calculated performance score of that employee, in relation to their weighted score based on their forecast and actuals, for all individual and team KPI and milestones they are responsible for.





**Individual Performance Summary**

Team | Role | Appraisee  
CEO | Admin | owner@thesolutioncrowd.com | 120%

**Appraisee**

Email address	Manager	Team	Avg. Team Score	Avg. Project Var
owner@thesolutioncrowd.com	No	CEO	90%	-6

**KPIs**

Owned	Missing	Score
3	0	54.7%

**Projects**

Managed	Missing	Avg. Var.
1	0	-1

**Milestones**

Owned	Missing	Avg. Var.
1	0	0

**Appraisal**

Appraiser	Appraiser's Team	Last Appraised	Competency score
nauman.khan@thesolutioncrowd.c	CEO	Monday, February 15, 2021 10:08 PM	120%

**Competencies**

<b>Communication Skills</b> 1x 4. Exceeds Expectations	<b>Flexibility</b> 1x 5. Exceptional	<b>Job knowledge</b> 1x 5. Exceptional
<b>Initiative</b> 1x 5. Exceptional	<b>Customer Focus</b> 1x 4. Exceeds Expectations	<b>Decision Making</b> 1x 4. Exceeds Expectations
<b>Leadership</b> 1x 2. Needs Improvement	<b>Team work</b> 3x 4. Exceeds Expectations	<b>Leadership 2</b> 1x 3. Meets Expectations

**History**

Notes for 2021

- owner@thesolutioncrowd.com Jul 2021  
Please show files to support this KPIadqada  
Sunday, July 4, 2021 9:21 AM
- owner@thesolutioncrowd.com Jul 2021  
Please note that I need more details about x  
Monday, August 9, 2021 1:22 PM

**New note for Oct 2021**

Rich text editor interface for adding a new note.

**KPI Graphs**

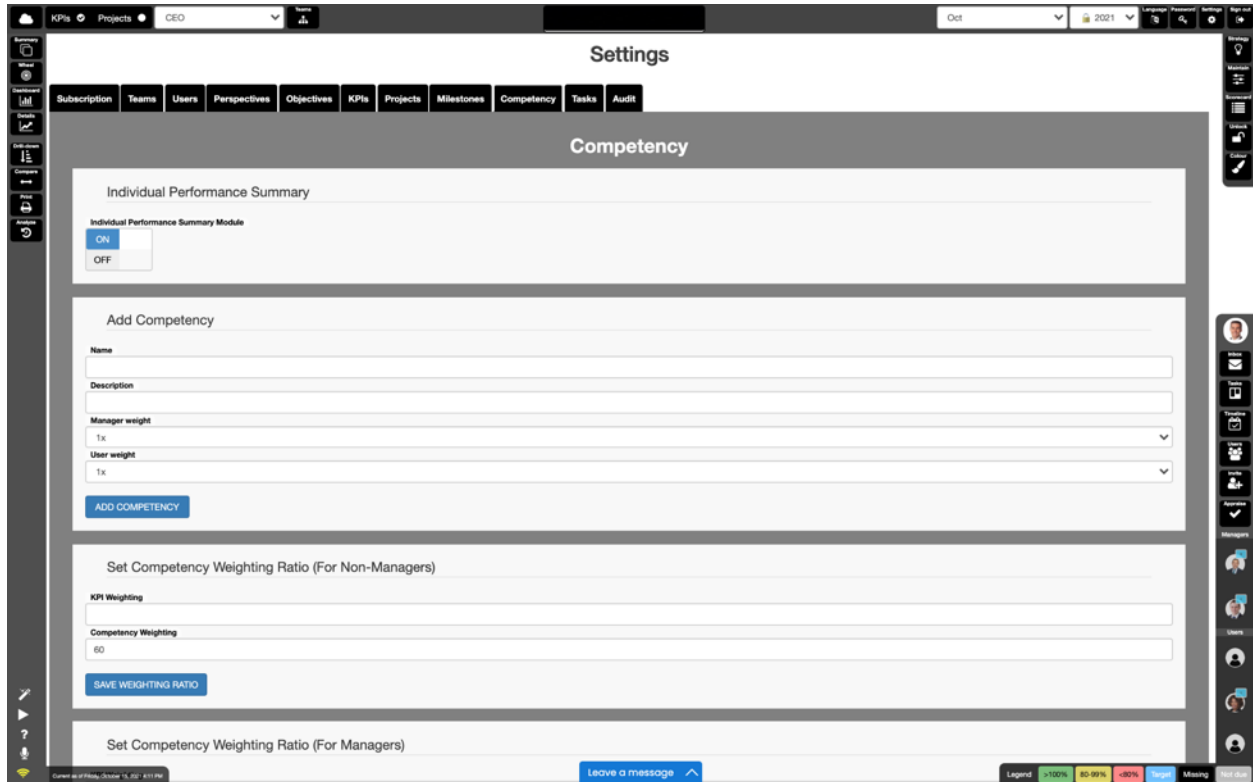
- Sales | Internal Process | Build effective organization governance | # OF NON-COMPLIANCE  
Line graph showing compliance levels over time.
- CEO | Customers | Provide quality & innovative customer service | quality review\*\*  
Bar chart showing quality review scores.
- Sales | Customers | Increase customer base & products and services | # of customers with sales more than 1 Mill  
Line graph showing customer base growth.

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (Light Blue)

# Staff appraisals

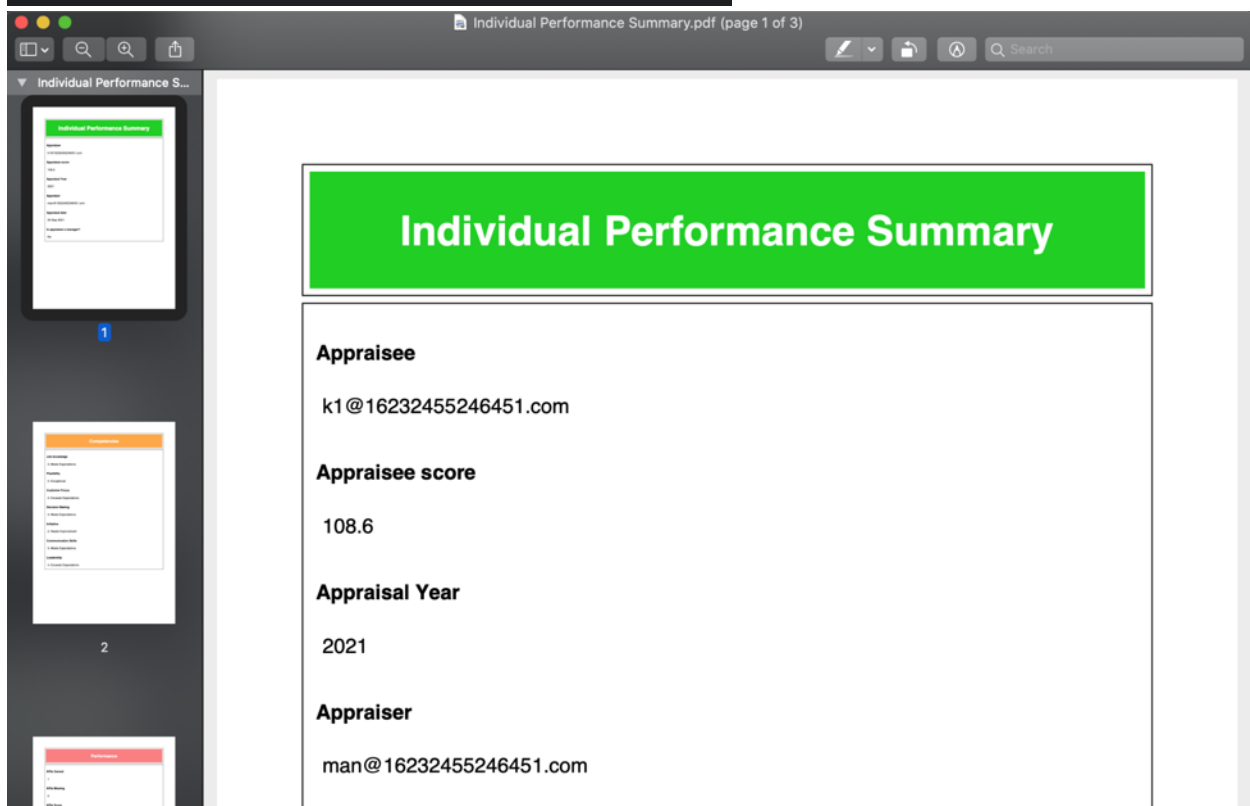
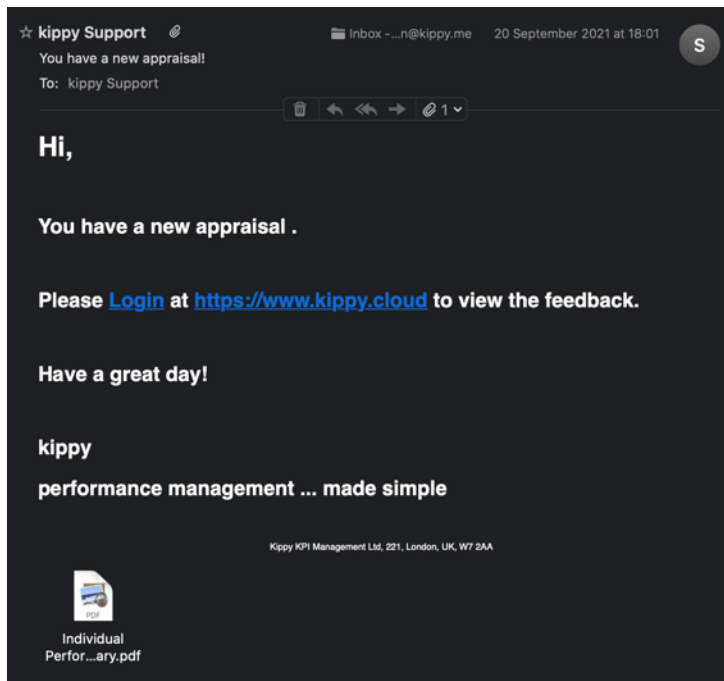
Managers can then appraise employees based on competencies. Please note:

- The competencies are weighted, defined and customized by administrators per the employee's role.
- Appraisals can be performed on a monthly and/or year-to-date basis (for non-cumulative KPIs)

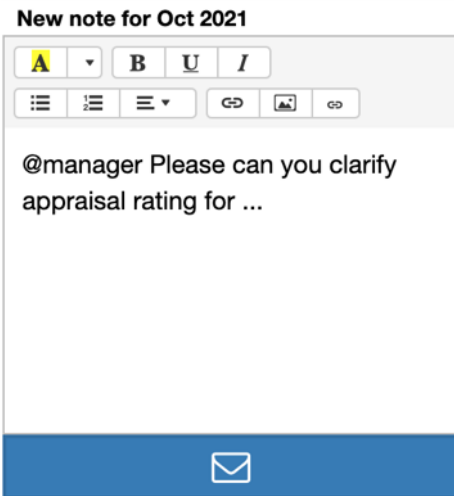


The screenshot displays the 'Settings' interface for 'Competency'. It includes a navigation bar with tabs for Subscription, Teams, Users, Perspectives, Objectives, KPIs, Projects, Milestones, Competency, Tasks, and Audit. The 'Competency' section is active, showing an 'Individual Performance Summary' toggle set to 'ON'. Below this is an 'Add Competency' form with fields for Name, Description, Manager weight (1x), and User weight (1x), and an 'ADD COMPETENCY' button. Further down, there are sections for 'Set Competency Weighting Ratio (For Non-Managers)' and 'Set Competency Weighting Ratio (For Managers)', each with input fields for KPI and Competency weighting, and a 'SAVE WEIGHTING RATIO' button. A 'Leave a message' button is at the bottom center. A legend at the bottom right indicates performance levels: >100% (green), 80-99% (orange), <80% (red), Target (blue), and Missing (grey).

- The manager's appraisal automatically creates an appraisal report which is automatically sent to the employee.



- The employee can then interact with the manager to discuss, create IDPs and if necessary escalate.



- The appraisal generates an average employee score and rating for the employee based on the weighted average of the performance score and the competency score.


## Individual Performance Summary

Team | Role | Appraiser

CEO | User | bob@thesolutioncrowd.com **105.5%**

---

**Appraisee**

	<b>Email address</b> bob@thesolutioncrowd.c	<b>Manager</b> No	<b>Team</b> CEO	<b>Avg. Team Score</b> 90%	<b>Avg. Project Var</b> -6
---	--	----------------------	--------------------	-------------------------------	-------------------------------

**KPIs**

<b>Owned</b> 1	<b>Missing</b> 0	<b>Score</b> 60%
-------------------	---------------------	---------------------

**Projects**

<b>Managed</b> 0	<b>Missing</b> 0	<b>Avg. Var.</b> n/a
---------------------	---------------------	-------------------------

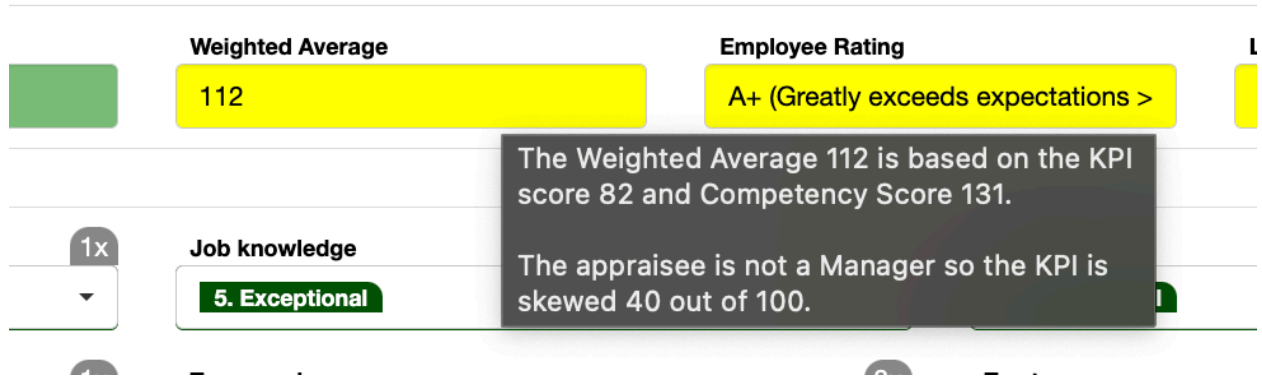
**Milestones**

<b>Owned</b> 0	<b>Missing</b> 0	<b>Avg. Var.</b> n/a
-------------------	---------------------	-------------------------

**Appraisal**

<b>Appraiser</b> sari@thesolutioncrowd.c	<b>Appraiser's Team</b> CEO	<b>Last Appraised</b> Saturday, September 4, 2021 2:56 P	<b>Competency score</b> 105.5%
---	--------------------------------	---	-----------------------------------

Hovering on the weighted average shows how the weighted average was calculated.



# Self appraisals

Employees can also perform self appraisals to indicate how they feel they are performing against the set competencies.

**Appraisals**

Team | Role | Appraisee  
CEO | Admin | Bob Smith

Appraisee

Appraisee	Manager	Team	Avg. Team Score	Avg. Project Var
Bob Smith	No	CEO		

KPIs

Owned	Missing	Score
0	0	n/a

Projects

Managed	Missing	Avg. Var.
0	0	n/a

Milestones

Owned	Missing	Avg. Var.
0	0	n/a

Appraisal

Appraiser	Competency score	Weighted Average	Employee Rating	Last Appraised
o@1jun.com	108.6%	109	4 (Excellent >100)	01-Jun-2022 16:..

Competencies

Competency	Score	Rating
Communication Skills	3. Sometimes	1x
Flexibility	5. Always	1x
Job knowledge	2. Rarely	1x
Initiative	2. Rarely	1x
Customer Focus	3. Sometimes	1x
Decision Making	5. Always	1x
Leadership	4. Often	1x

Legend: >=100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (Grey)

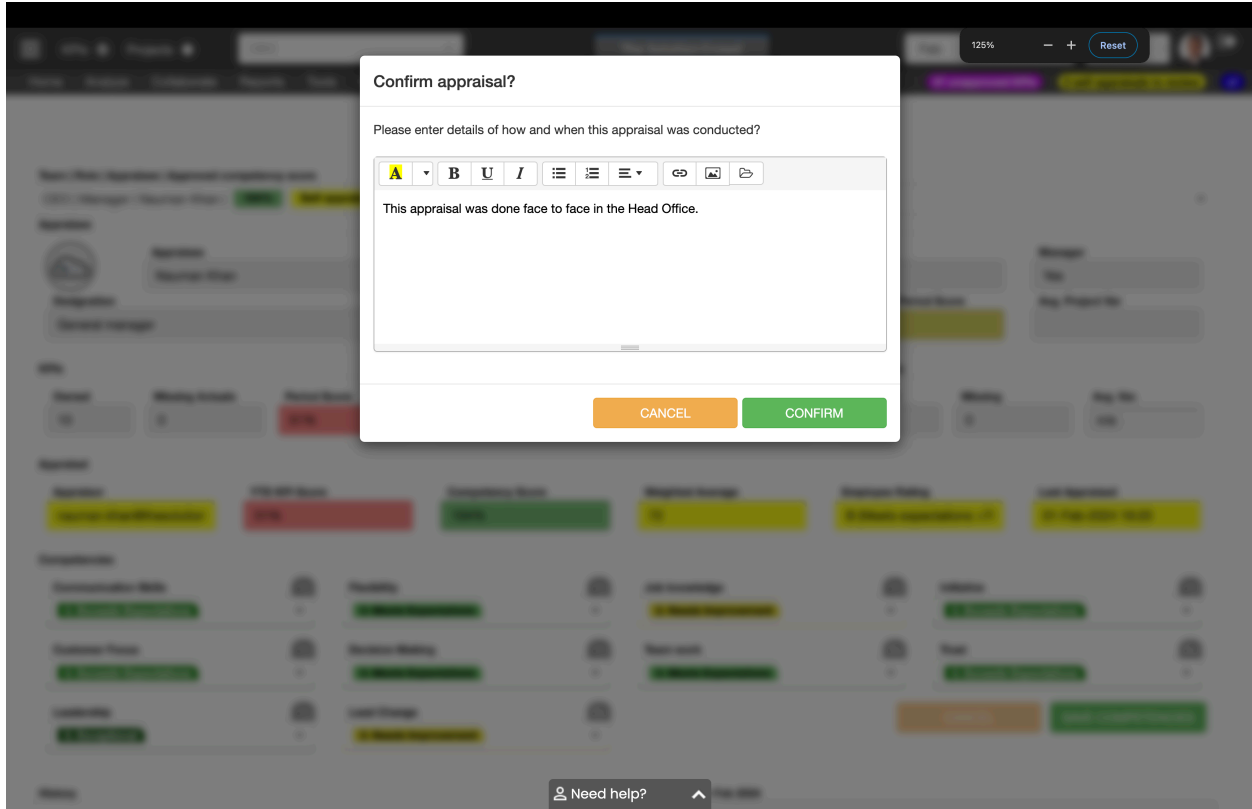
Self-appraisals are not included in Employee Rating reports until approved by a manager.

All self-appraisals and manager appraisals are visible in an immutable audit log.

Use “Confirm appraisal details” option in settings to ensure additional details must be provided as part of each appraisal.



## Kippy – Features





# Employee Ratings

## HR Report

This is all available to HR in a live ratings report, showing the current rating of each employee based on their average employee score - in kippy, a microapp or over web APIs.

**Employee Rating Report**

Employee email	Is manager	KPI score	Competency score	Average score	Weighted average score	Rating
lina@thesolutioncrowd.com	Yes					
alex.sanchez@thesolutioncrowd.com	No	0		0	0	1 (Poor <60)
nesrain@thesolutioncrowd.com	Yes					
ake.simmons@thesolutioncrowd.com	No	50		50	50	1 (Poor <60)
mike@thesolutioncrowd.com	Yes		85	85	85	3 (Good 80-100)
bob@thesolutioncrowd.com	No	60	105	83	87	3 (Good 80-100)
alem.selimovic@thesolutioncrowd.com	Yes	90		90	90	3 (Good 80-100)
imran.khan@thesolutioncrowd.com	Yes	91		91	91	3 (Good 80-100)
owner@thesolutioncrowd.com	No	55	120	87	94	3 (Good 80-100)
hi@thesolutioncrowd.com	No	78	111	94	98	3 (Good 80-100)
sari@thesolutioncrowd.com	Yes	102		102	102	4 (Excellent >100)
nauman.khan@thesolutioncrowd.com	Yes	119		119	119	4 (Excellent >100)
test@thesolutioncrowd.com	No	125		125	125	4 (Excellent >100)
emma.windsor@thesolutioncrowd.com	No	225		225	225	4 (Excellent >100)

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (Grey)





### Employee Rating Report

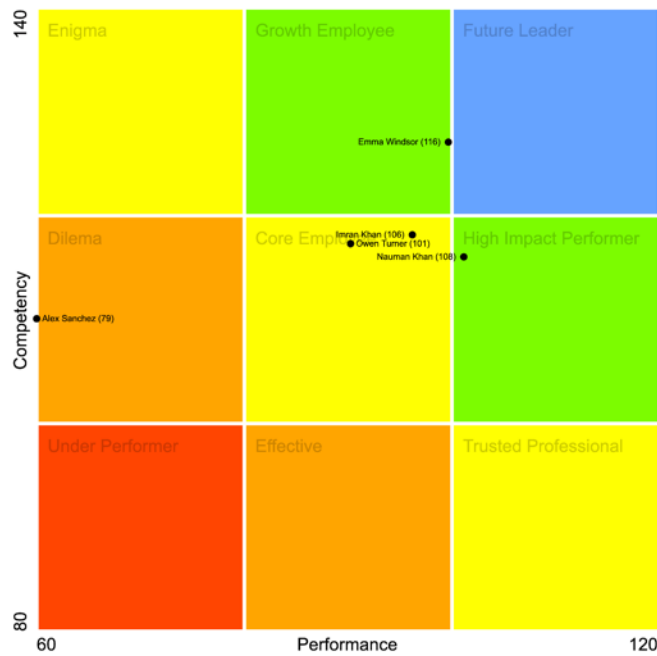
Employee email	Is manager	KPI Score	Comp Score	Avg	Weighted Avg	Rating
lina@thesolutioncrowd.com	Yes					
alex.sanchez@thesolutioncrowd.com	No	0		0	0	1 (Poor <60)
nesrain@thesolutioncrowd.com	Yes					
ake.simmons@thesolutioncrowd.com	No	50		50	50	1 (Poor <60)
mike@thesolutioncrowd.com	Yes		85	85	85	3 (Good 80-100)
bob@thesolutioncrowd.com	No	60	105	83	87	3 (Good 80-100)
alem.selimovic@thesolutioncrowd.com	Yes	90		90	90	3 (Good 80-100)
imran.khan@thesolutioncrowd.com	Yes	91		91	91	3 (Good 80-100)
owner@thesolutioncrowd.com	No	55	120	87	94	3 (Good 80-100)
hi@thesolutioncrowd.com	No	78	111	94	98	3 (Good 80-100)
sari@thesolutioncrowd.com	Yes	102		102	102	4 (Excellent >100)
nauman.khan@thesolutioncrowd.com	Yes	119		119	119	4 (Excellent >100)
test@thesolutioncrowd.com	No	125		125	125	4 (Excellent >100)
emma.windsor@thesolutioncrowd.com	No	225		225	225	4 (Excellent >100)

Generated: Fri Oct 15 15:38:54 UTC 2021

This is also presented in a (configurable and filterable) 9-Box grid microapp.



### The 9-Box Grid





# The 9-Box Grid (Team Filter)

Period

Jun / Q2 / H1

Year

2023

Team

1: CEO

Tree depth

This team only

Grade

--All grades--

Designation

--All designations--

Back Search

Emma Windsor	4	Emma Windsor	No	Senior	Business Development	133	74	98	3 (Good 80-100)
Ake Simmons	4	Ake Simmons	No	Junior	Sales rep	94		94	3 (Good 80-100)
Imran Khan	3	UK	Yes	Executive	Acting Operations Senior Manager	113	65	94	3 (Good 80-100)
Mike Bowni	2	Information Technology	Yes		IT Manager	74	112	89	3 (Good 80-100)
Hi Jones	1	CEO	No	Associate	PA	84	90	87	3 (Good 80-100)
Nesrain Etihad	2	Sales	Yes		Sales Manager	75	83	78	2 (Average 60-80)
Lina Maher	2	Business Support	Yes	Senior manager	Project manager		72	72	2 (Average 60-80)
Business Support 1	3	Business Support 1	No						

## Notes

### Notes for Nauman Khan

Created by	Created on	Reporting period	Summary
Nauman Khan	11-Jan-2023 22:26	Jan	n

### Notes for Bobby Blake

Created by	Created on	Reporting period	Summary
Nauman Khan	03-Jan-2023 15:45	Jan	Your performance has been totally unsatisfactory!
Nauman Khan	04-Jan-2023 14:21	Jan	This appraisal was done face to face. The key outputs were: - work on time keeping - do a udemy course on conflict resolution
Nauman Khan	10-Jan-2023 08:39	Jan	Good improvement. Good chat!

### Notes for Owen Turner

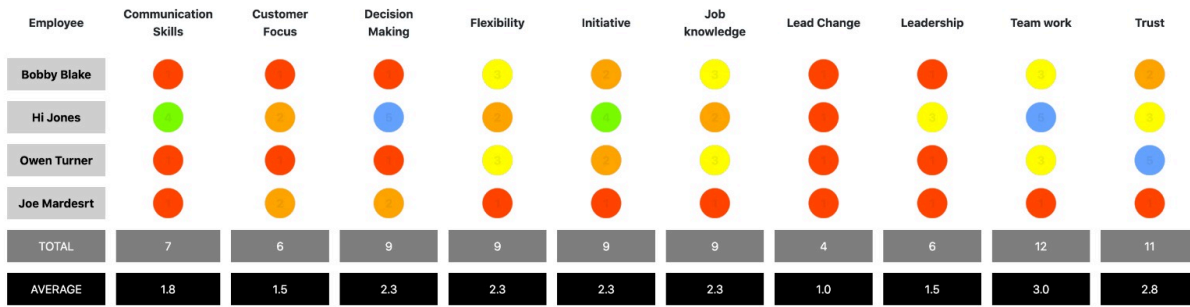
Created by	Created on	Reporting period	Summary
Nauman Khan	24-Mar-2023 08:47	Mar	this is a new note

Back Print Team Filter User Filter

Generated: Mon Jun 19 09:54:06 UTC 2023



Competencies



Overview

Employee	Level	Team	Is manager	Grade	Designation	KPI score	Competency score	Weighted Average	Employee rating
Owen Turner	1	CEO	Yes	Executive	Founder	118	77	102	A+ (Greatly exceeds expectations >100)
Hi Jones	1	CEO	No	Associate	PA	98	90	93	A (Exceeds expectations >80)
Bobby Blake	1	CEO	No	Senior manager	VP	118	62	84	A (Exceeds expectations >80)
Nauman Khan	1	CEO	Yes	Executive	General manager	83		83	A (Exceeds expectations >80)
Joe Marderst	1	CEO	No	Senior manager	VP	74	62	67	C (Needs development >60)

Configurable with generic competencies (as above) or Grade-specific competencies (as below)

Competencies



Overview

Employee	Level	Team	Is manager	Grade	Designation	KPI score	Competency score	Weighted Average	Employee rating
Usain	2	Production Quality	No	QA Lead	Tester		93	93	3 (Good 80-100)
Owen	1	CEO	Yes	Management		55	109	76	2 (Average 60-80)
Sue	1	CEO	No				73	73	2 (Average 60-80)
Manny	1	CEO	Yes	Management					

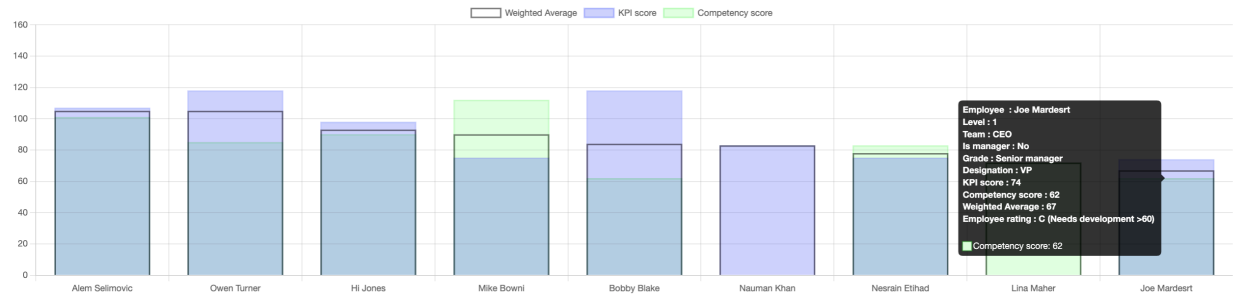
Notes

Interactive graphs also show ordered performance by employees and teams.



# Kippy – Features

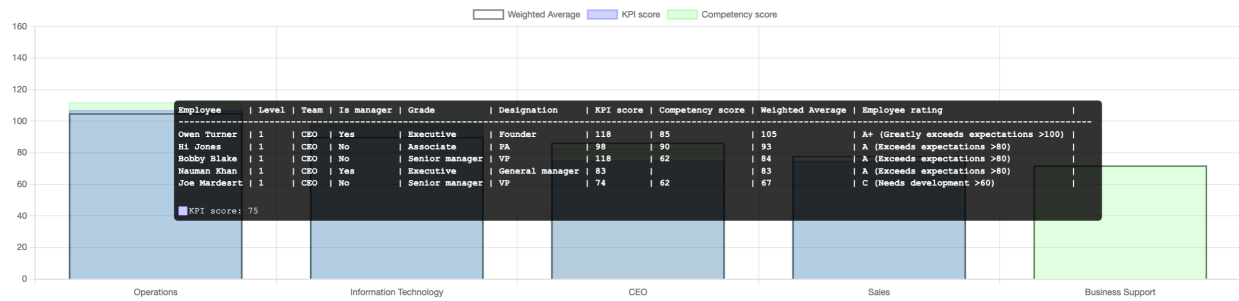
## By employee



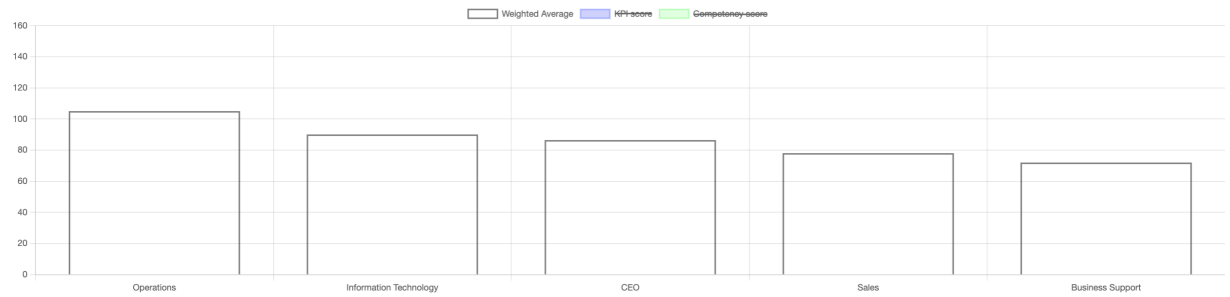
## By team

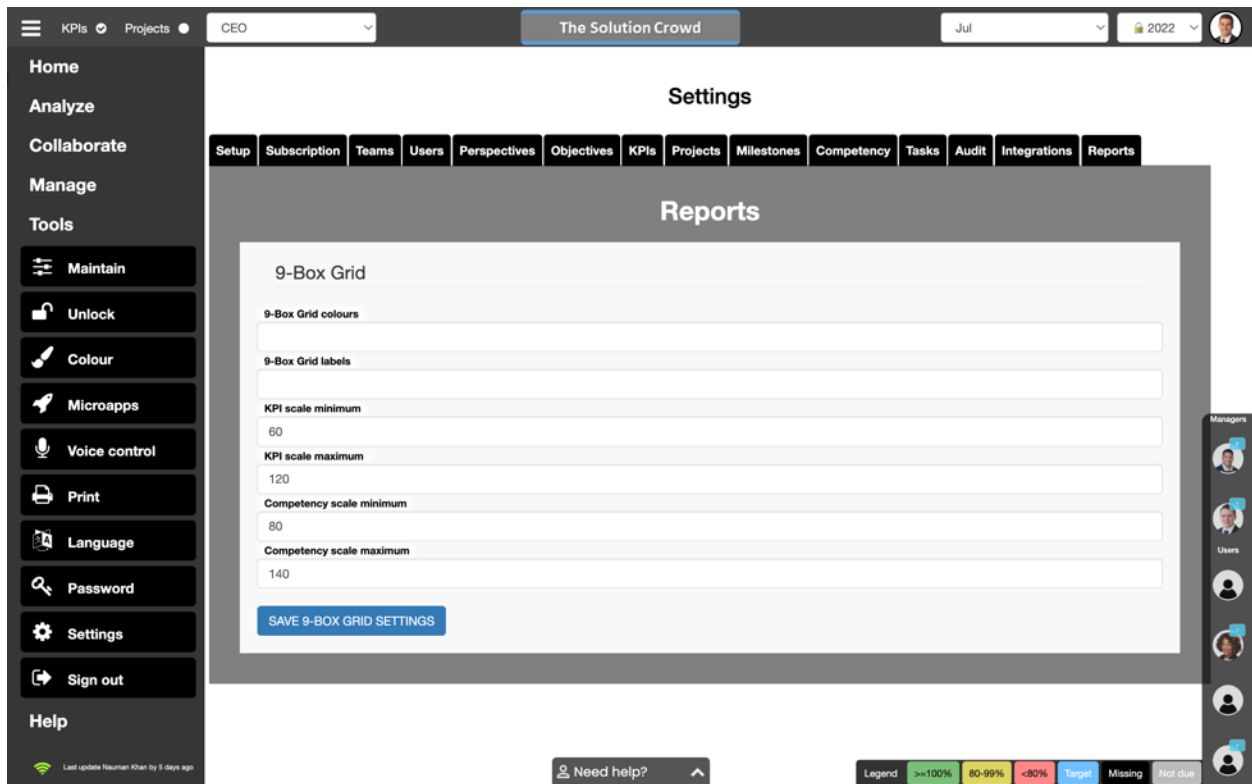


## By team



## By team





The individual view of the 9-box shows changes over the year and includes a summary of manager feedback.

A report of last appraisals is also available to show the competency score and kpi score for each employee exactly as at the time their last appraisal was performed by their manager.



### Last appraisals report ( Apr 2024)

Employee name	Employee email	Is manager	KPI score	Competency score	Weighted Average	Employee rating	Last appraised by	Last appraised on
Hi Jones	hi@thesolutioncrowd.com	No						
bob	bob@thesolutioncrowd.com	No						
Imran Khan	imran.khan@thesolutioncrowd.com	Yes						
joe	joe@thesolutioncrowd.com	No						
Alem Selimovic	alem.selimovic@thesolutioncrowd.com	Yes						
Alex Sanchez	alex.sanchez@thesolutioncrowd.com	No						
Ake Simmons	ake.simmons@thesolutioncrowd.com	No		n/a			Nauman Khan	07-Jan-2024 18:41
Emma Windsor	emma.windsor@thesolutioncrowd.com	No						
Sari Kana	sari@thesolutioncrowd.com	Yes						
Owen Turner	owner@thesolutioncrowd.com	Yes						
Mike Bowni	test@thesolutioncrowd.com	Yes						
tim	tim@thesolutioncrowd.com	No						
george	george@thesolutioncrowd.com	No						
Salam Halabi	test2@thesolutioncrowd.com	Yes						
Nesrain Etihad	nesrain@thesolutioncrowd.com	Yes						
Mike Lastes	mike@thesolutioncrowd.com	Yes						
Lina Maher	lina@thesolutioncrowd.com	Yes						
Ian Field	ian@thesolutioncrowd.com	No						
Nauman Khan	nauman.khan@thesolutioncrowd.com	Yes	132	104.0	121	A+ (Greatly exceeds expectations >100)	Owen Turner	06-Mar-2024 11:38

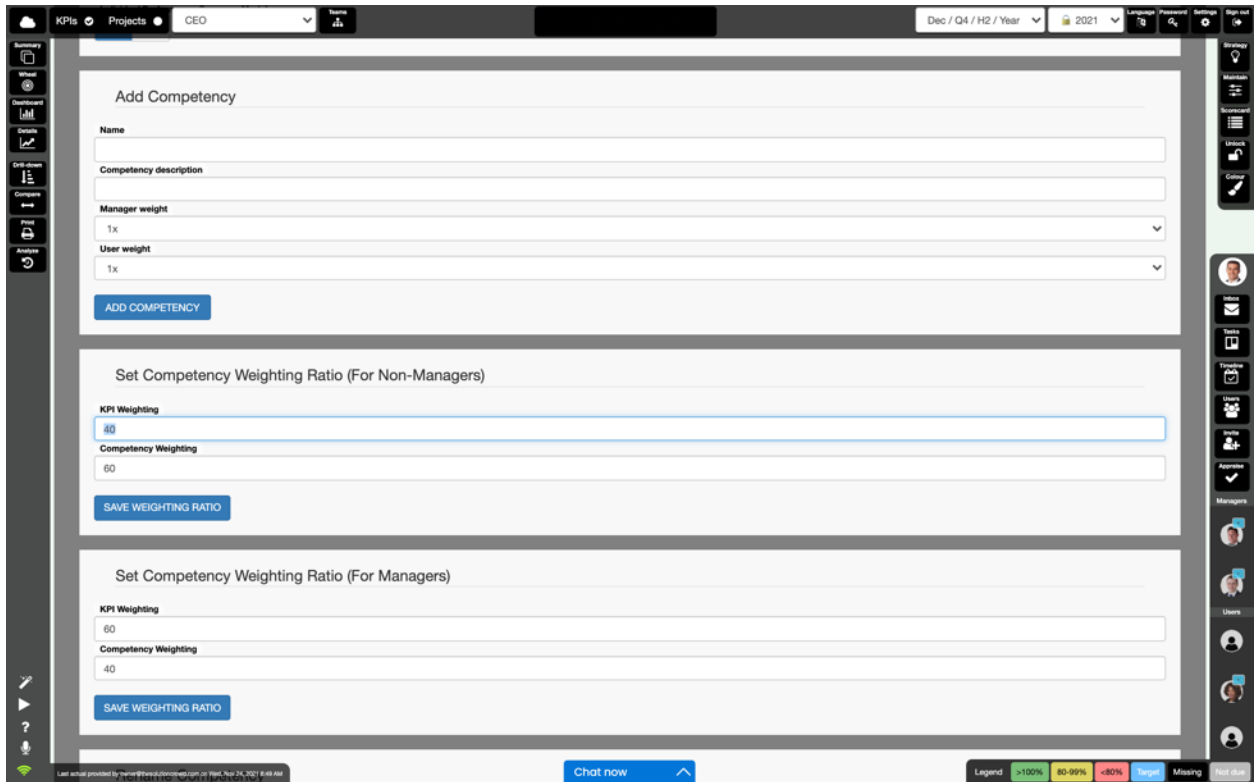
[Back](#) [Print](#) [Download](#)

Last updated: Sat Apr 06 09:18:06 UTC 2024

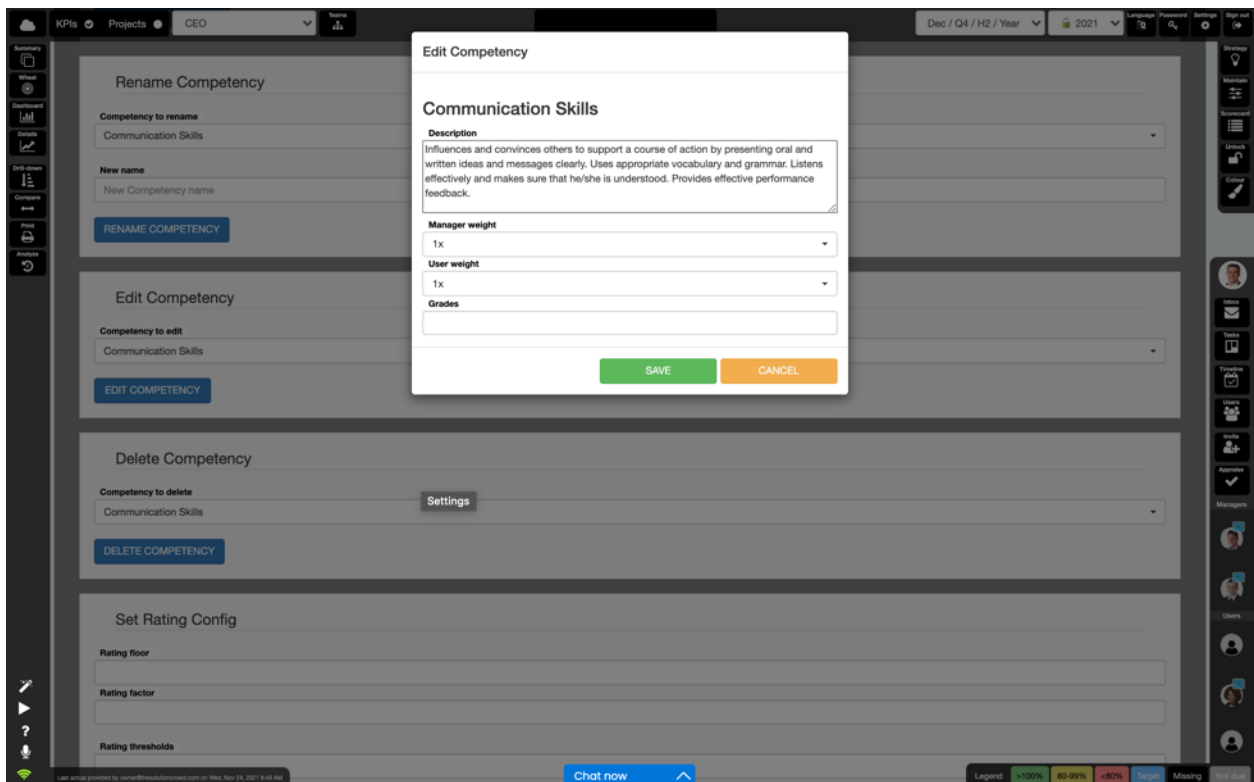
## Competencies, grades and weightings

Everything used to appraise and score staff is self-configurable.

Change weightings based on role. Change ratio of competency and KPI score for total score.



Add maintain your own set of competencies. Set different competencies for different 'grades' of user.





Configure your own formula for how ratings are calculated. Lock appraisals to meet your internal appraisal timeframes.

### Set Rating Config

**Rating floor**

**Rating factor**

**Rating thresholds**

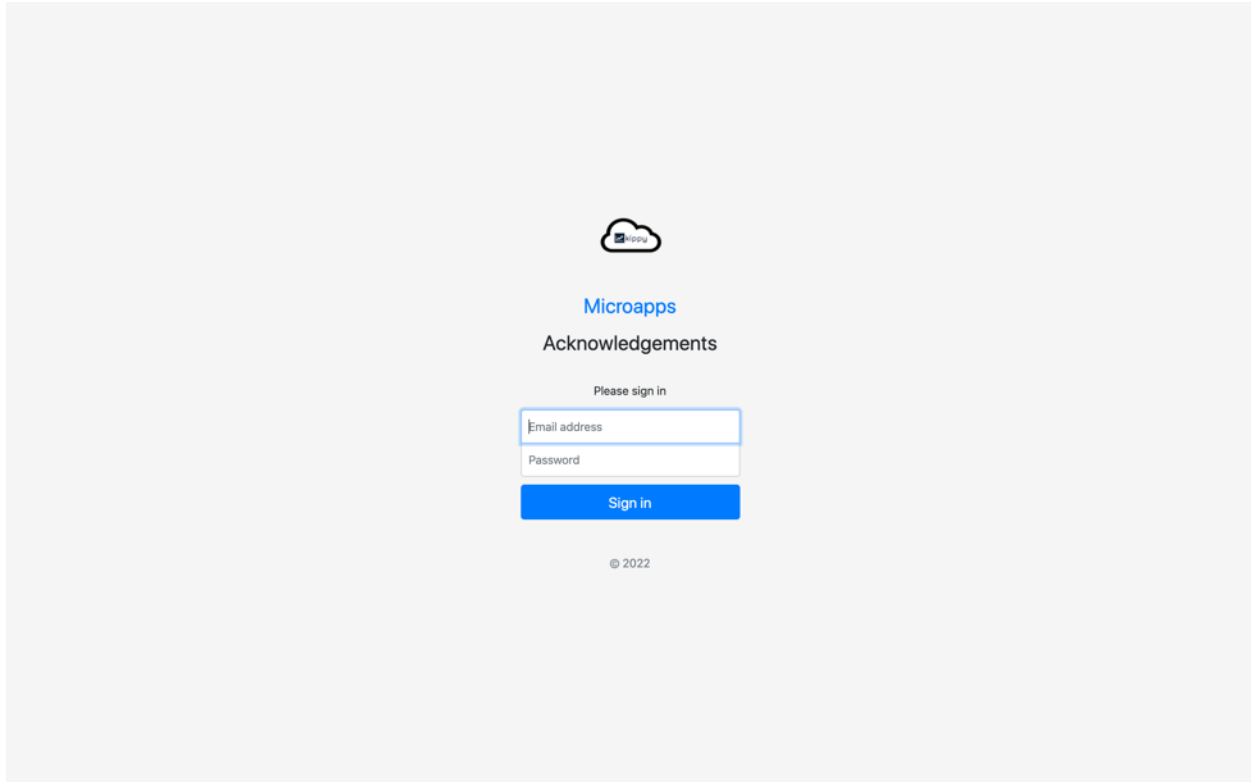
**Lock appraisals**  OFF

**SAVE WEIGHTING RATIO**

## Acknowledgements and 360-degree Feedback

Users can leave acknowledgements for other users.





### Select user to acknowledge


#### Users

-  [bob@exorg.com](#)
-  [manny@exorg.com](#)
-  [nauman@exorg.com](#)
-  [xavier@exorg.com](#)
-  [zaki@exorg.com](#)

Generated: Sun Jan 23 20:08:14 UTC 2022

The acknowledgement and 360-degree feedback can also be left anonymously.



Staff Lens | Nesrain Etihad (nesrain@thesolutioncrowd.com)  X

[Acknowledge](#) | [KPIs](#) | [Annual](#) | [9Box](#) | [Review KPIs](#) | [Audit](#) |

### Acknowledge

Nesrain Etihad (nesrain@thesolutioncrowd.com)

Relation to employee  
 Manager  Peer  Customer  Direct report

Time spent with employee  
 Daily  Weekly  Monthly  Occasionally

Anonymous  
 Show your name

360 feedback criteria

Presentation	★★★★★	Nice slide deck during townhall
Negotiation	★★★★★	Please leave a positive, concise and constructive note ...
Conflict management	★★★★★	Please leave a positive, concise and constructive note ...
Verbal communication	★★★★★	Please leave a positive, concise and constructive note ...
Written communication	★★★★★	Please leave a positive, concise and constructive note ...
Independence	★★★★★	Please leave a positive, concise and constructive note ...
Judgements	★★★★★	Please leave a positive, concise and constructive note ...

The acknowledgement and 360-degree feedback are then available to the recipients and their managers – on the Individual Performance Summary screen.

The screenshot shows a user interface for 'exorg.com' with a navigation bar at the top containing 'KPIs', 'Projects', 'Sales', and 'Teams'. The main content area is titled 'Acknowledgements' and displays a list of feedback messages with star ratings and timestamps. Below this, there are 'KPI Graphs' for various categories like 'Sales | People | o3 | k4' and 'Sales | Finance | o2 | k3'. A bottom status bar includes a 'Need help?' button and a legend for performance metrics.

**Acknowledgements**

- ★★★ Your insights and instruction are always appreciated. However, I feel that I perform and learn better when you allow me to figure out how to achieve the target on my own. 15 second ago anonymously
- ★ Sometimes the amount of tasks and responsibilities on my plate feel overwhelming. I would be grateful if you are able to provide any assistance with something I am struggling with. 47 second ago by usain@exorg.com, a direct report who interacts weekly
- ★★ I was surprised that you found my ideas to be far off base. In order to avoid future misunderstandings about what direction you want me to take, I would like to have more frequent and detailed discussions. 1 minute ago by usain@exorg.com, a direct report who interacts daily
- ★★★★★ I appreciate all of the coaching and mentoring opportunities you have kindly provided. I want to continue working closely with you to promote my professional growth and career development. 1 minute ago anonymously
- ★★★★★ Whenever I run into an unforeseen issue I know that I can come to you to discuss it. I hope we can continue to tackle those roadblocks and come up with solutions together. 2 minutes ago anonymously
- ★★ Great effort to get the project live - but would be great to see the output of any retrospective. 30 minutes ago anonymously
- ★★★★★ I want to thank you for always showing enthusiasm and being willing to jump in wherever the team needs assistance or guidance. That kind of leadership really helps us to stay motivated. 1 hour ago by usain@exorg.com, a direct report who interacts weekly

**KPI Graphs**

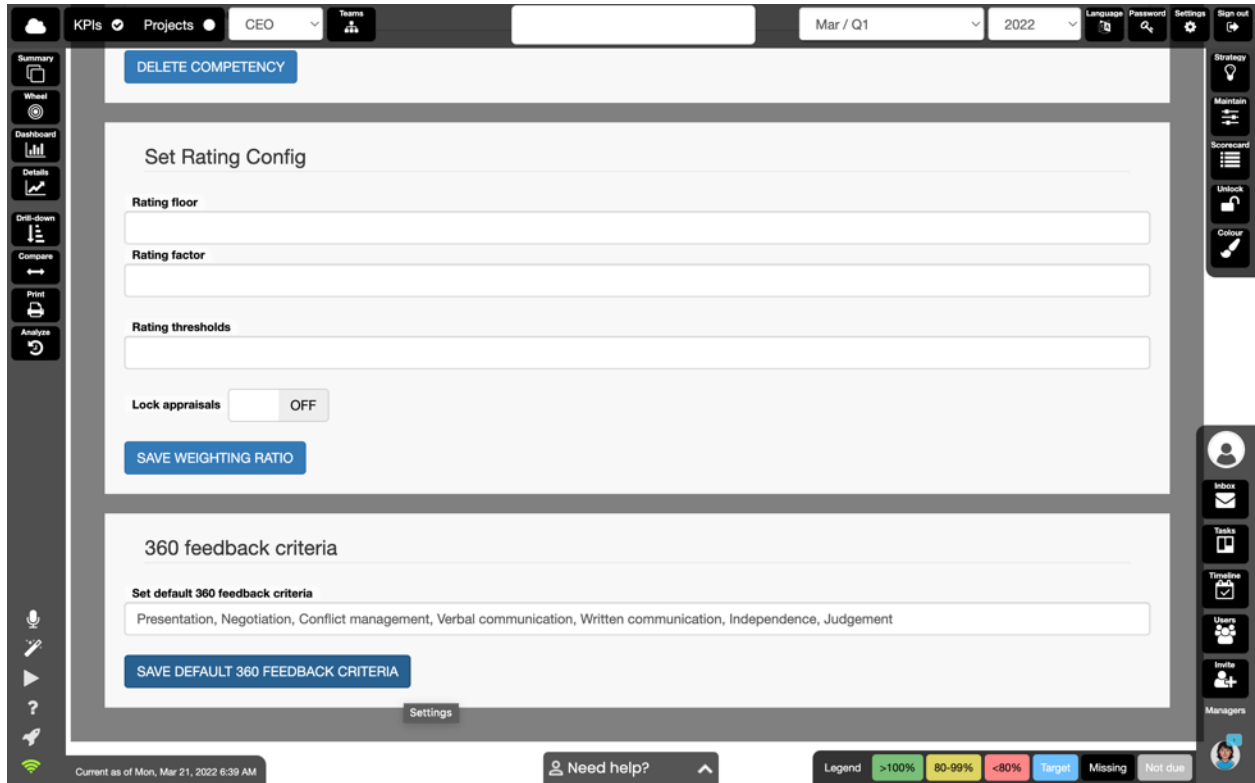
- Sales | People | o3 | k4
- Sales | Finance | o2 | k3
- Sales | Process | o4 | k5
- Sales | Finance | o2 | k2

Legend: >100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (Grey)

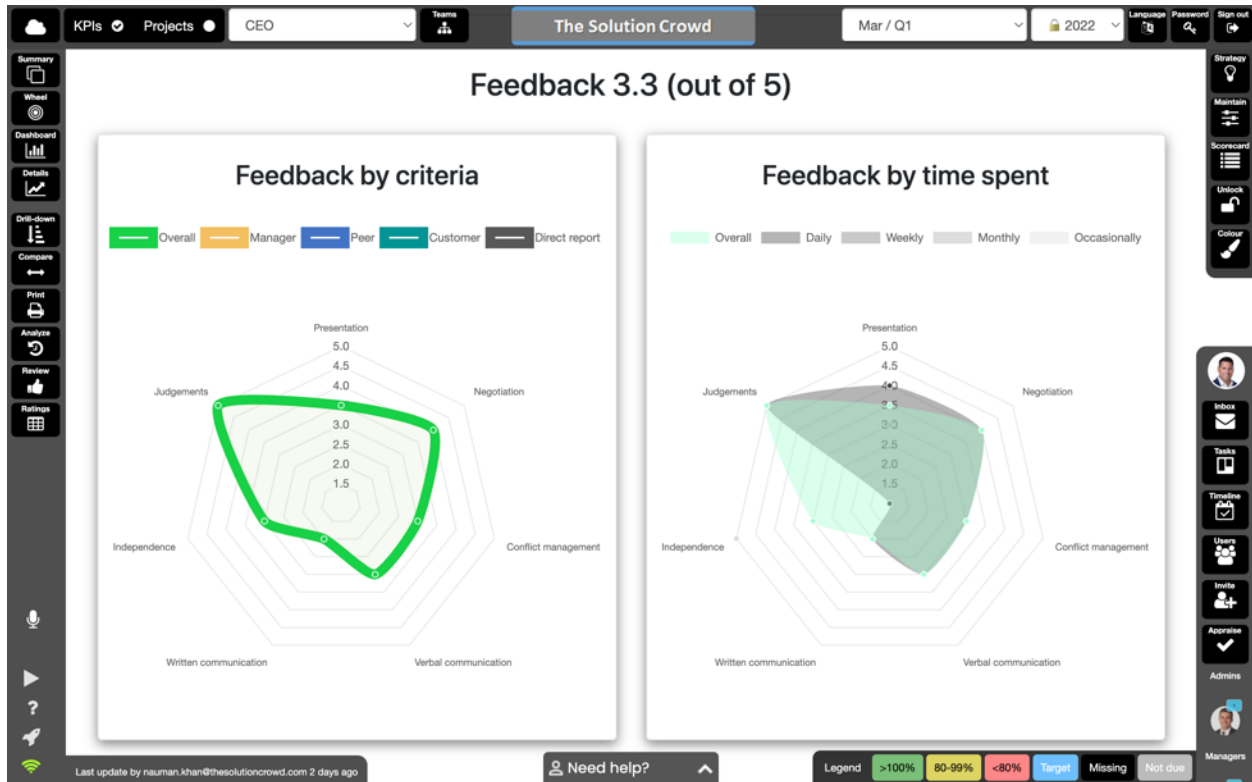


The feedback can also be left via the main kippy app clicking on a user's avatar.

The feedback criteria are configurable in the setting screen.



The feedback is summarized in interactive radar graphs per employee.



The average feedback score is also presented on the Employee Rating Report.

**Employee Rating Report**

Employee name	Employee email	Is manager	Project score	KPI score	Competency score	Weighted average	Employee rating	Feedback (out of 5)
	lina@thesolutioncrowd.com	Yes						
	mike@thesolutioncrowd.com	Yes						
Alex Sanchez	alex.sanchez@thesolutioncrowd.com	No		0	98	59	1 (Poor <60)	
	test@thesolutioncrowd.com	No		60		60	2 (Average 60-80)	
	ake.simmons@thesolutioncrowd.com	No	-30	0	102	61	2 (Average 60-80)	3.3
	joe@thesolutioncrowd.com	No		64		64	2 (Average 60-80)	
	bob@thesolutioncrowd.com	No	-40	79		79	2 (Average 60-80)	
	emma.windsor@thesolutioncrowd.com	No	-10	36	113	82	3 (Good 80-100)	
	owner@thesolutioncrowd.com	No	-22	57	105	86	3 (Good 80-100)	
	alem.selimovic@thesolutioncrowd.com	Yes	-7	88		88	3 (Good 80-100)	
	nauman.khan@thesolutioncrowd.com	Yes		81	105	90	3 (Good 80-100)	3.6
	hi@thesolutioncrowd.com	No	-1	94		94	3 (Good 80-100)	
	nauman.khan@thesolutioncrowd.com	Yes			109			



# Reports

Additional print-friendly reports are available by Team, KPIs, Projects, Milestones, Users, Objectives and Org structure. Reports can be downloaded as comma-delimited .csv files for Excel.

## Team Report

**Team report**

Organisation	Team	For Year	For Period	Last refreshed
thesolutioncrowd.com	CEO	2022	Dec / Q4 / H2 / Year	Current as of Sun, Dec 11, 2022 10:21 AM

Vision	Mission	Values
Honoring our past by creating a future characterized by stimulated growth, development and the incessant practice of excellence in everything we do...	Delivering exceptional value to our customers through the engagement of our talented people, the application of best practice thinking in everything we do, the emphasis on quality and excellence and the focus on delivering superior performance that preserves our future ...	P – Proactive effective management operations S – Service high quality service and efficiency U – Upbeat academic environment that nurtures excellence in learning, teaching and research

Perspective	Objective	KPI Name	Formula	Owner	Weight	Unit	Cumulative	Data source	Direction	Frequency	Target	Actual	Score(%)
Finance	Maximize revenues & returns from core and new business	Total revenues from international market	Total international revenues generated as per financial statement	Imran Khan	1x	Mill \$	Yes	Operations	Increase is better	Monthly	95	70	74%
Finance	Maximize revenues & returns from core and new business	Total revenues from new products	Total revenues generated as per financial statement from new products	Alem Selimovic	1x	Mill \$	Yes	Operations	Increase is better	Monthly	25	35	140%
Finance	Maximize revenues & returns from core and new business	Total revenues	Total revenues generated as per financial statement	Owen Turner	2x	Mill \$	Yes	Operations	Increase is better	Monthly	20	10	50%
Finance	Maximize revenues & returns from core and new business	Total value of inventory	Total value of inventory	Imran Khan	1x	Mill \$	Yes	Operations	Decrease is better	Monthly	100	120	83%
Finance	Optimize capital & operating expenditure	Average cost per FTE	Total manpower cost / Total # of FTE	Alem Selimovic	1x	Mill. USD	Yes	Finance Dept.	Decrease is better	Yearly	1.5	1.2	125%
Finance	Optimize capital & operating expenditure	CAPEX budget performance	Actual CAPEX / CAPEX * 100	Alem Selimovic	2x	%	Yes	Finance Dept.	Decrease is better	Quarterly	95	89	107%
Finance	Optimize capital & operating expenditure	OPEX budget performance	Actual OPEX / OPEX budget * 100	Owen Turner	3x	%	Yes	Finance Dept.	Decrease is better	Monthly	95	100	95%
Customers	Increase customer base &	Awareness has											

Legend: >=100% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not Due (Light Blue)



# KPIs Report

Sign out

## KPI Report

Period

Dec / Q4 / H2 / Year

Year

2022

[Back](#)

[Simple](#)

[Detailed](#)

Sign out

## KPI Report

Team	Perspective	PTO	Objective	KPI Name	KPI Description	Owner	Weight	Unit	Cumulative	Direction	Frequency
Alex Sanchez	Customers	Increase customer base & products and services	Increase customer base & products and services	# of customers with sales more than 1 Mill		alex.sanchez@thesolutioncrowd.com	1x		Yes	Increase is better	Monthly
Alex Sanchez	People	Build a performance driven culture	Build a performance driven culture	# of Innovation ideas submitted		alex.sanchez@thesolutioncrowd.com	1x		Yes	Increase is better	Monthly
CEO	Finance		Maximize revenues & returns from core and new business	Total revenues from international market	Total international revenues	imran.khan@thesolutioncrowd.com	1x	Mill \$	Yes	Increase is better	Monthly
CEO	Finance		Maximize revenues & returns from core and new business	Total revenues from new products	Total revenues from new product (product created 2019-2023)	alem.selimovic@thesolutioncrowd.com	1x	Mill \$	Yes	Increase is better	Monthly
CEO	Customers		Increase customer base & products and services	Customer churn		owner@thesolutioncrowd.com	1x	000's	Yes	Increase is better	Yearly
CEO	Finance		Optimize capital & operating expenditure	CAPEX budget performance	Company is facing large construction investments over the next years and it is crucial to control the CAPEX spend to ensure a timely and cost-efficient progression of the project	alem.selimovic@thesolutioncrowd.com	2x	%	Yes	Decrease is better	Quarterly
CEO	Finance		Maximize revenues & returns from core and new business	Total value of inventory	Total value of inventory on hand related to raw materials and finished goods and in process	imran.khan@thesolutioncrowd.com	1x	Mill \$	Yes	Decrease is better	Monthly
CEO	Customers		Provide quality & innovative customer service	% Customers satisfaction	Satisfied customers is crucial to guarantee a smooth growth. All customers should be included in this unified and centralized survey.	imran.khan@thesolutioncrowd.com	2x	%	Yes	Increase is better	Semi-annual
CEO	Internal Process		Improve & automate efficient processes	% of IT Service tickets closed on time	Improve the (IT service requested) ticket closure & increase customer satisfaction	imran.khan@thesolutioncrowd.com	1x	%	Yes	Increase is better	Monthly
CEO	Customers		Increase customer base & products and services	Invite new prospects		nauman.khan@thesolutioncrowd.com	2x	# of prospects	No	Increase is better	Quarterly
CEO	Internal Process		Build effective organization governance	Timely closure of audit observations	Complying with audit observations is important for company success and should be handled by each unit individually	imran.khan@thesolutioncrowd.com	2x	%	Yes	Increase is better	Quarterly



### KPI Detailed Report ( Dec 2022)

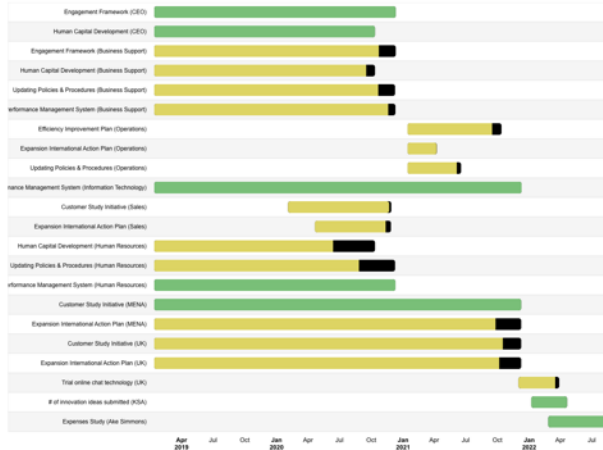
Team	Perspective	Objective	KPI Name	KPI Description	Formula	Owner	Weight	Unit	Cumulative	Data source	Direction	Frequency	Target	Actual	Score(%)
Alex Sanchez	Customers	Increase customer base & products and services	# of customers with sales more than 1 Mill			alex.sanchez@thesolutioncrowd.com	1x		Yes		Increase is better	Monthly			
Alex Sanchez	People	Build a performance driven culture	# of innovation ideas submitted			alex.sanchez@thesolutioncrowd.com	1x		Yes		Increase is better	Monthly	5	2	40
CEO	People	Build a performance driven culture	# of innovation ideas submitted	To track (as a start) number of ideas submitted through Company Innovation program at all levels	Total # of innovation ideas submitted & accepted	alem.selimovic@thesolutioncrowd.com	1x	Idea	Yes	HR Dept.	Increase is better	Monthly	30	40	133
CEO	Internal Process	Improve & automate efficient processes	# of key business processes improved and or automated	In order to achieve operational excellence, Company needs to enhance and/or automate existing processes	Total # of business processes improved and/or automated	imran.khan@thesolutioncrowd.com	1x	Bus. Process	Yes	Quality Dept.	Increase is better	Monthly	10	5	50
CEO	People	Build a performance driven culture	# projects started			test@thesolutioncrowd.com	2x	Unit	Yes	Customer file	Increase is better	Monthly	95		
CEO	Customers	Provide quality & innovative customer service	% Customers satisfaction	Satisfied customers is crucial to guarantee a smooth growth. All customers should be included in this unified and centralized survey.	Average results of customers satisfaction survey	imran.khan@thesolutioncrowd.com	2x	%	Yes	Sales Dept	Increase is better	Semi-annual	95	75	79
CEO	People	Attract & retain & develop capable talent	% Employees Turnover	To keep Company manpower stable by retaining good performing	Total # of left/terminated employees / Total # of employees	imran.khan@thesolutioncrowd.com	1x	%	Yes	HR Dept.	Decrease is better	Semi-annual	10	13	77



# Projects report



## Projects Report ( Dec 2022)



Team	Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Total budget	Total spent	Variance	Programs	Target	Actual	sp %	Percent done
CEO	People	Build a performance driven culture	Engagement Framework	2k	shiva.shang@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	11-Oct-2022	30000.0	40000.0	-10000.0	Programs	96	91	1	101
CEO	People	Attract & retain & develop capable talent	Human Capital Development	1k	adam.ahmed@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	12-Oct-2022	25000.0	16000.0	-10000.0		100	100	0	100
Business Support	People	Build a performance driven culture	Engagement Framework	2k	shiva.shang@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	11-Oct-2022	30000.0	40000.0	-10000.0		100	93	-7	93
Business Support	People	Attract & retain & develop capable talent	Human Capital Development	1k	adam.ahmed@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	12-Oct-2022	25000.0	16000.0	-10000.0		99	91	-8	98
Business Support	Internal Process	Build effective operational governance	Updating Policies & Procedures	2k	neep.shan@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	09-Oct-2022	2000.0	2000.0	0.0		100	99	-1	93
Business Support	Internal Process	Improve & automate efficient processes	Updating Performance Management System	1k	adam.ahmed@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	10-Oct-2022	10000.0	9000.0	-1000.0		98	97	-1	97
Operations	Internal Process	Improve & automate efficient processes	Efficiency Improvement Plan	1k			16-Jan-2021	13-Oct-2021					98	98	-10	96
Operations	Customers	Increase customer base & products and services	Expansion International Action Plan	1k			16-Jan-2021	09-Apr-2021					100	99	-1	99
Operations	Internal Process	Build effective operational governance	Updating Policies & Procedures	1k			16-Jan-2021	16-Jan-2021					99	99	-8	94
Information Technology	Internal Process	Improve & automate efficient processes	Updating Performance Management System	1k	adam.ahmed@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	10-Oct-2021	10000.0	9000.0	-1000.0		100	100	0	100
Sales	Customers	Provide quality & innovative customer service	Customer Study Initiative	1k			03-Feb-2022	28-Nov-2022	100	99	-1		100	98	-2	98
Sales	Customers	Increase customer base & products and services	Expansion International Action Plan	1k	neep.shan@theunioncloud.com		21-Apr-2022	27-Nov-2022	500	400	-100		100	93	-7	93
Human Resources	People	Attract & retain & develop capable talent	Human Capital Development	1k	adam.ahmed@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	12-Oct-2022	25000.0	16000.0	-10000.0		100	91	-9	91
Human Resources	Internal Process	Build effective operational governance	Updating Policies & Procedures	2k	neep.shan@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	09-Oct-2022	2000.0	2000.0	0.0		100	99	-10	93
Human Resources	Internal Process	Improve & automate efficient processes	Updating Performance Management System	1k	adam.ahmed@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	10-Oct-2022	10000.0	9000.0	-1000.0		98	100	2	104
MENA	Customers	Provide quality & innovative customer service	Customer Study Initiative	2k	shiva.shang@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	09-Oct-2021	8000.0	2300.0	-5700.0		100	100	0	100
MENA	Customers	Increase customer base & products and services	Expansion International Action Plan	2k	shiva.shang@theunioncloud.com	neuman.shan@theunioncloud.com	12-Jan-2019	09-Oct-2021	15000.0	1300.0	-13700.0		100	100	0	100

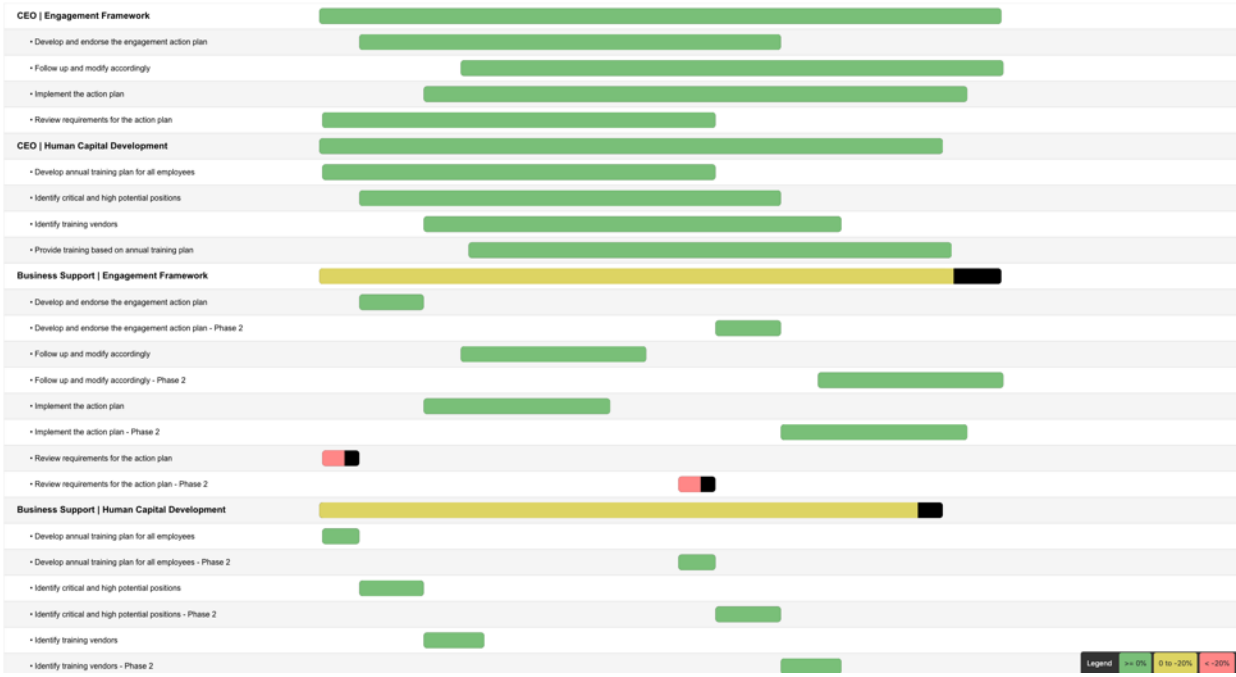




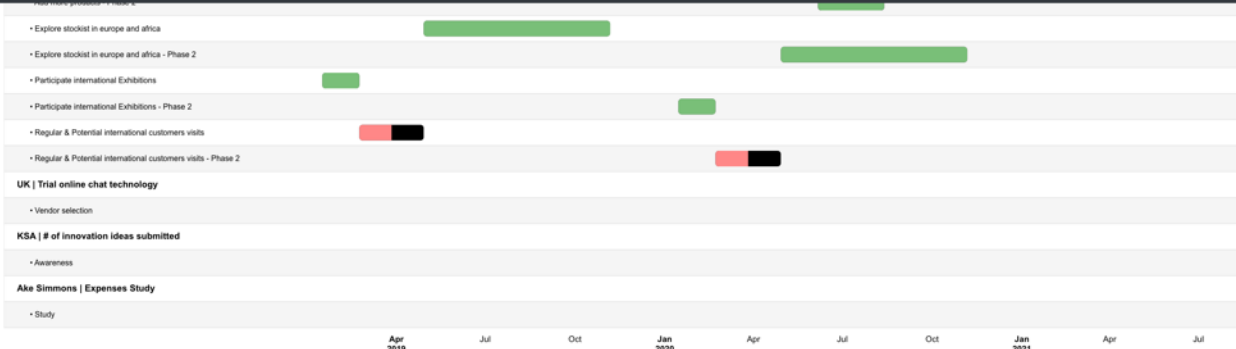
# Milestones Report

Sign out

## Milestones Report ( Dec 2022)



Sign out



Team	Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Total budget	Total spent	Variance	Programme	Target	Actual	var %	% done
CEO	People	Build a performance driven culture	Engagement Framework	2x	inran.khan@thesolutioncrowd.com	nauman.khan@thesolutioncrowd.com	12-Jan-2019	11-Dec-2020	50000.0	40000.0	-10000.0		90	91	1	101
Milestone Name		Milestone Description		Weight	Milestone owner		Start date	End date	Target	Actual	var %	% done				
Develop and endorse the engagement action plan		Develop and endorse the engagement action plan		1x	alam.sellmovic@thesolutioncrowd.com		22-Feb-2019	29-Apr-2020	100	100	0	100				
Follow up and modify accordingly		Follow up and modify accordingly if required		2x	alam.sellmovic@thesolutioncrowd.com		06-Jun-2019	13-Dec-2020	100	100	0	100				
Implement the action plan		Implement the action plan		1x	inran.khan@thesolutioncrowd.com		29-Apr-2019	06-Nov-2020	100	100	0	100				
Review requirements for the action plan		Review requirements for the action plan - including survey results, observations, suggestion box, etc.		1x	inran.khan@thesolutioncrowd.com		15-Jan-2019	22-Feb-2020	40	43	3	105				

Team	Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Total budget	Total spent	Variance	Programme	Target	Actual	var %	% done
CEO	People	Attract & retain & develop capable talent	Human Capital Development	1x	alam.sellmovic@thesolutioncrowd.com	nauman.khan@thesolutioncrowd.com	12-Jan-2019	12-Oct-2020	25000.0	15000.0	-10000.0		100	100	0	100
Milestone Name		Milestone Description		Weight	Milestone owner		Start date	End date	Target	Actual	var %	% done				
Develop annual training plan for all employees		Develop annual training plan for all employees		2x	inran.khan@thesolutioncrowd.com		15-Jan-2019	22-Feb-2020	100	100	0	100				
Identify critical and high potential positions		Identify critical and high potential positions		1x	inran.khan@thesolutioncrowd.com		22-Feb-2019	29-Apr-2020	100	100	0	100				
Identify training vendors		Identify training vendors to work with on delivering all planned courses and workshops		2x	alam.sellmovic@thesolutioncrowd.com		29-Apr-2019	30-Jun-2020	100	100	0	100				
Provide training based on annual training plan		Provide training based on annual training plan		3x	alam.sellmovic@thesolutioncrowd.com		14-Jun-2019	21-Oct-2020	100	100	0	100				

Legend: >= 0% (Green), 0 to < 20% (Yellow), < < 20% (Red)



# Users reports



## User Report

### Kippy Users ( 16 )

Name	Email address	Role	Team	Grade	Designation
Nauman Khan	nauman.khan@thesolutioncrowd.com	Manager	CEO	Exec	CEO
Hi Jones	hi@thesolutioncrowd.com	User	CEO		
Salam Halabi	test2@thesolutioncrowd.com	Manager	KSA		Manager
Emma Windsor	emma.windsor@thesolutioncrowd.com	User	Emma Windsor		
Mike Bowni	test@thesolutioncrowd.com	Manager	Information Technology		IT Manager
Sari Kana	sari@thesolutioncrowd.com	Manager	CEO		
Lina Maher	lina@thesolutioncrowd.com	Manager	Business Support		
Ake Simmons	ake.simmons@thesolutioncrowd.com	User	Ake Simmons		
Owen Turner	owner@thesolutioncrowd.com	Manager	CEO		
Alem Selimovic	alem.selimovic@thesolutioncrowd.com	Manager	Operations		
Imran Khan	imran.khan@thesolutioncrowd.com	Manager	UK		Acting Operations Senior Manager
Mike Lastes	mike@thesolutioncrowd.com	Manager	Human Resources		Manager
Alex Sanchez	alex.sanchez@thesolutioncrowd.com	User	Alex Sanchez		
Nesrain Ethad	nesrain@thesolutioncrowd.com	Manager	Sales		Sales Manager
Bod Black	bob@thesolutioncrowd.com	User	CEO		VP
Joe Mardest	joe@thesolutioncrowd.com	User	CEO		

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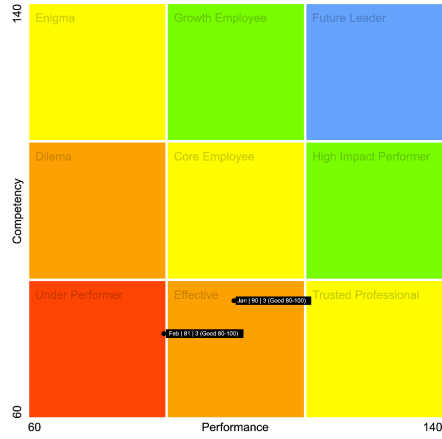
## User Report

### Kippy Users ( 16 )

KPIs	Targets	Appraisals	Name	Email address	Role	Team	Grade	Designation
			Nauman Khan	nauman.khan@thesolutioncrowd.com	Manager	CEO	Executive	CEO
			Hi Jones	hi@thesolutioncrowd.com	User	CEO	Associate	PA
			Salam Halabi	test2@thesolutioncrowd.com	Manager	KSA		Manager
			Emma Windsor	emma.windsor@thesolutioncrowd.com	User	Emma Windsor	Senior	Business Development
			Mike Bowni	test@thesolutioncrowd.com	Manager	Information Technology		IT Manager
			Sari Kana	sari@thesolutioncrowd.com	Manager	MENA	Associate	Project manager
			Lina Maher	lina@thesolutioncrowd.com	Manager	Business Support	Senior manager	Project manager
			Ake Simmons	ake.simmons@thesolutioncrowd.com	User	Ake Simmons	Junior	Sales rep
			Owen Turner	owner@thesolutioncrowd.com	Manager	CEO		Founder
			Alem Selimovic	alem.selimovic@thesolutioncrowd.com	Manager	Operations	Executive	CTO
			Imran Khan	imran.khan@thesolutioncrowd.com	Manager	UK	Executive	Acting Operations Senior Manager
			Mike Lastes	mike@thesolutioncrowd.com	Manager	Human Resources		Manager



User Appraisals  
( Alex Sanchez - 2023 )

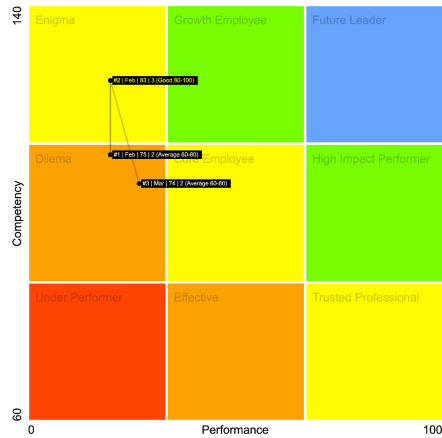


Month	Weighted Average	Employee rating	KPI score	Competency score	Appraised on	Appraised by
Jan	90	3 (Good 80-100)	100	82	24-Feb-2023	nauman.khan@thesolutioncrowd.com
Feb	81	3 (Good 80-100)	87	76	24-Feb-2023	nauman.khan@thesolutioncrowd.com

Back Print History

Generated: Fri Feb 24 13:50:57 UTC 2023

User Appraisals History  
( u - 2023 )



#	Month	Weighted Average	Employee rating	KPI score	Competency score	Appraised on	Appraised by
1	Feb	75	2 (Average 60-80)	20	111	24-Feb-2023	m@test.24feb.com
2	Feb	83	3 (Good 80-100)	20	125	24-Feb-2023	u@test.24feb.com
3	Mar	74	2 (Average 60-80)	27	105	24-Feb-2023	m@test.24feb.com

Back Print

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# Objectives



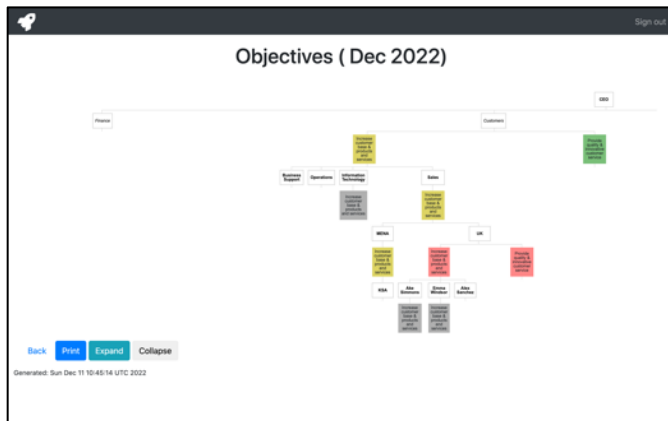
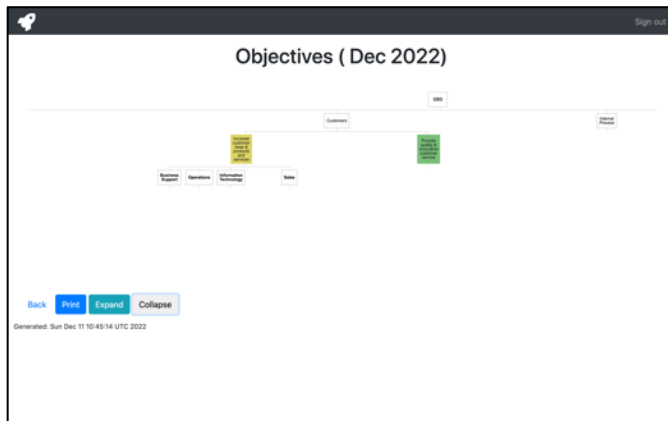
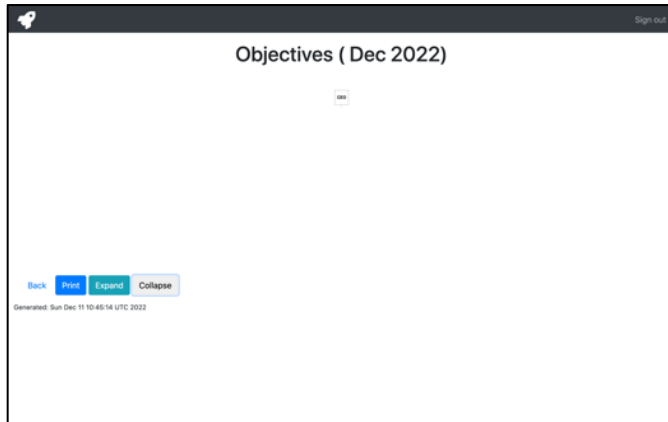
## Objectives ( Dec 2022)



[Back](#) [Print](#) [Expand](#) [Collapse](#)

Generated: Sun Dec 11 10:34:52 UTC 2022

The objectives report is interactive. By hovering over the objectives, you can follow their cascade down the organisation.





# Org reports

Sign out

## Org Report

### Kippy Teams ( 12 )

Level	Parent team	Name	KPI score	Project score
1		CEO	97.0	0.0
2	CEO	Business Support	102.0	-6.0
2	CEO	Operations	105.0	-6.0
2	CEO	Information Technology	81.0	0.0
2	CEO	Sales	77.0	-4.0
3	Business Support	Human Resources	91.0	-12.0
3	Sales	MENA	107.0	-4.0
3	Sales	UK	75.0	-6.0
4	MENA	KSA	116.0	0.0
4	UK	Ake Simmons		0.0
4	UK	Alex Sanchez	40.0	
4	UK	Emma Windsor	106.0	

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## Org Report

### Kippy Teams Details ( 12 )

Parent Level	Parent team	Name	KPI score	Project score	Managers	Users	Admins	Vision	Mission	Values
1		CEO	97.0	0.0	Nauman Khan (nauman.khan@thesolutioncrowd.com), Owen Turner (owner@thesolutioncrowd.com) System owner , Sari Kana (sari@thesolutioncrowd.com)	Bod Black (bob@thesolutioncrowd.com), Hi Jones (hi@thesolutioncrowd.com), Joe Mardesrt (joe@thesolutioncrowd.com)		Honoring our past by creating a future characterized by stimulated growth, development and the incessant practice of excellence in everything we do...	Delivering exceptional value to our customers through the engagement of our talented people, the application of best practice thinking in everything we do, the emphasis on quality and excellence and the focus on delivering superior performance that preserves our future ...	P – Proactive effective management operations S – Service high quality service and efficiency U – Upbeat academic environment that nurtures excellence in learning, teaching and research
2	CEO	Business Support	102.0	-6.0	Lina Maher (lina@thesolutioncrowd.com)					
2	CEO	Operations	105.0	-6.0	Alem Selimovic (alem.selimovic@thesolutioncrowd.com)					
2	CEO	Information Technology	81.0	0.0	Mike Bowni (test@thesolutioncrowd.com)					
2	CEO	Sales	77.0	-4.0	Nesrain Ethad (nesrain@thesolutioncrowd.com)					
3	Business Support	Human Resources	91.0	-12.0	Mike Lastes (mike@thesolutioncrowd.com)					
3	Sales	MENA	107.0	-4.0						
3	Sales	UK	75.0	-6.0	Imran Khan (imran.khan@thesolutioncrowd.com)					
4	MENA	KSA	116.0	0.0	Salam Halabi (test2@thesolutioncrowd.com)					
4	UK	Ake Simmons		0.0		Ake Simmons (ake.simmons@thesolutioncrowd.com)				
4	UK	Alex Sanchez	40.0			Alex Sanchez (alex.sanchez@thesolutioncrowd.com)				
4	UK	Emma Windsor	106.0			Emma Windsor (emma.windsor@thesolutioncrowd.com)				

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# Annual reports

See annual view per user/team KPIs and projects.

Sign out

## Team Report

(CEO - 2023)

**KPIs**

Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Build a performance driven culture	# of innovation Ideas submitted	1x	Alem Selimovic	Idea	Yes	Increase is better	Monthly	5   7 (500%)	5   7 (500%)	5   7 (500%)	5   7 (500%)	5   2 (250%)	5   2 (250%)	5   2 (250%)	5   2 (250%)	6   5 (120%)	6   5 (120%)	6   5 (120%)	15   9 (167%)
Internal Process	Improve & automate efficient processes	# of key business processes improved and or automated	1x	Imran Khan	Bus. Process	Yes	Increase is better	Monthly	-   7 (-)	-   2 (-)	1   3 (33%)	1   5 (20%)	1   5 (20%)	-   5 (-)	2   6 (33%)	2   6 (33%)	2   6 (33%)	-   6 (-)	3   8 (37%)	3   10 (30%)
Customers	Increase customer base & products and services	# of new product introduced	3x	Nauman Khan	Product	Yes	Increase is better	Monthly	3   1 (300%)	1   1 (100%)	1   1 (100%)	2   1 (200%)	2   2 (100%)	2   2 (100%)	2   2 (100%)	2   2 (100%)	2   3 (67%)	2   3 (67%)	3   3 (100%)	4   3 (133%)
People	Build a performance driven culture	# projects started	2x	Mike Bowni	Unit	Yes	Increase is better	Monthly	1   5 (20%)	1   5 (20%)	1   5 (20%)	2   8 (25%)	3   8 (37%)	3   8 (37%)	3   9 (33%)	5   9 (56%)	5   9 (56%)	5   10 (50%)	9   10 (90%)	10   10 (100%)
Customers	Provide quality & innovative customer service	% Customers satisfaction	2x	Imran Khan	%	Yes	Increase is better	Semi-annual	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	60   70 (86%)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	90   85 (106%)
People	Attract retain & develop capable talent	% Employees Turnover	1x	Imran Khan	%	Yes	Decrease is better	Semi-annual	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	5   15 (300%)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	15   15 (100%)
Internal Process	Improve & automate efficient processes	% of IT Service tickets closed on time	1x	Imran Khan	%	Yes	Increase is better	Monthly	30   90 (33%)	40   90 (44%)	50   90 (56%)	60   90 (67%)	60   90 (67%)	60   90 (67%)	60   95 (63%)	60   95 (63%)	60   95 (63%)	70   95 (74%)	-   95 (-)	100   95 (105%)
Customers	Increase customer base & products and services	% of customer left and services	2x	Nauman Khan	%	Yes	Decrease is better	Monthly	10   17 (110%)	11   15 (136%)	11   16 (145%)	11   17 (155%)	11   18 (164%)	12   20 (167%)	16   30 (187%)	16   31 (194%)	16   32 (200%)	18   33 (183%)	19   35 (184%)	20   35 (175%)
Finance	Optimize capital & operating expenditure	Average cost per FTE	1x	Alem Selimovic	Mill. USD	Yes	Decrease is better	Yearly	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	1.79   2.5 (140%)
People	Build a performance driven culture	Average employee satisfaction rating	1x	Alem Selimovic	%	No	Increase is better	Yearly	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	-   - (-)	65   75 (87%)
People	Attract retain & develop capable talent	Average training hours per FTE	1x	Imran Khan	Hour	Yes	Increase is better	Monthly	5   5 (100%)	5   5 (100%)	5   5 (100%)	-   70 (-)	5   70 (50%)	6   70 (60%)	6   70 (60%)	6   70 (60%)	6   75 (40%)	8   75 (53%)	10   75 (67%)	10   75 (67%)
Customers	Increase customer base & products	Awareness has	1x	Sad Kana	new	Yes	Increase is better	Quarterly	-   - (-)	-   - (-)	60   80 (-)	-   - (-)	-   - (-)	65   90 (-)	-   - (-)	-   - (-)	70   95 (-)	-   - (-)	-   - (-)	75   100 (-)



Projects and milestones

Engagement Framework																			
Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Build a performance driven culture	Engagement Framework	2x	Imran Khan	Nauman Khan	12-Jan-2019	11-Dec-2020	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)
Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Develop and endorse the engagement action plan	1x	Alem Selimovic	22-Feb-2019	29-Apr-2020	5 / 0 (105%)	15 / 10 (105%)	70 / 20 (150%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	
Follow up and modify accordingly	3x	Alem Selimovic	06-Jun-2019	13-Dec-2020	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	0 / 50 (65%)	25 / 60 (80%)	50 / 70 (80%)	60 / 80 (80%)	70 / 90 (80%)	90 / 95 (95%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	
Implement the action plan	1x	Imran Khan	29-Apr-2019	06-Nov-2020	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	0 / 30 (70%)	5 / 40 (65%)	10 / 50 (60%)	50 / 60 (90%)	70 / 70 (100%)	80 / 80 (100%)	100 / 90 (110%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)		
Review requirements for the action plan	1x	Imran Khan	15-Jan-2019	22-Feb-2020	25 / 50 (75%)	90 / 100 (90%)	95 / 100 (95%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)		

Human Capital Development																			
Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Attract retain & develop capable talent	Human Capital Development	1x	Alem Selimovic	Nauman Khan	12-Jan-2019	12-Oct-2020	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)
Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Develop annual training plan for all employees	2x	Imran Khan	15-Jan-2019	22-Feb-2020	25 / 50 (75%)	90 / 100 (90%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)		
Identify critical and high potential positions	1x	Imran Khan	22-Feb-2019	29-Apr-2020	10 / 0 (110%)	25 / 25 (100%)	60 / 50 (110%)	70 / 100 (70%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)		
Identify training vendors	2x	Alem Selimovic	29-Apr-2019	30-Jun-2020	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	10 / 25 (85%)	80 / 60 (120%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)		
Provide training based on annual training plan	3x	Alem Selimovic	14-Jun-2019	21-Oct-2020	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	5 / 0 (105%)	15 / 10 (105%)	60 / 50 (110%)	80 / 60 (120%)	100 / 70 (130%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)		



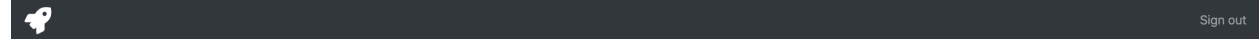
User report for nauman.khan@thesolutioncrowd.com (2022)

Team	Perspective	Objective	KPI Name	Weight	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
CEO	Customers	Increase customer base & products and services	# of new product introduced	3x	Product	Yes	Increase is better	Monthly	0 / 1 (0%)	1 / 2 (50%)	4 / 3 (133%)	3 / 4 (75%)	4 / 5 (80%)	6 / 6 (100%)	7 / 7 (100%)	7 / 8 (87%)	8 / 9 (89%)	8 / 10 (80%)	8 / 10 (80%)	8 / 10 (80%)
CEO	Customers	Increase customer base & products and services	% of customer left	2x		Yes	Decrease is better	Monthly	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)
CEO	Customers	Increase customer base & products and services	Invite new prospects	2x	# of prospects	No	Increase is better	Quarterly	n/a / n/a (n/a)	n/a / n/a (n/a)	3 / 3 (100%)	n/a / n/a (n/a)	n/a / n/a (n/a)	2 / 4 (50%)	n/a / n/a (n/a)	n/a / n/a (n/a)	15 / 6 (250%)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)
CEO	Customers	Provide quality & innovative customer service	Quality review	3x	Completed	Yes	Increase is better	Monthly	30 / 30 (100%)	20 / 35 (57%)	40 / 40 (100%)	40 / 45 (89%)	52 / 45 (116%)	60 / 50 (120%)	61 / 50 (122%)	62 / 50 (124%)	62 / 60 (103%)	65 / 60 (108%)	65 / 60 (108%)	65 / 60 (108%)
CEO	Customers	Increase customer base & products and services	Total # of customers	1x		Yes	Increase is better	Monthly	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)	n/a / n/a (n/a)
		Build	Timely																	



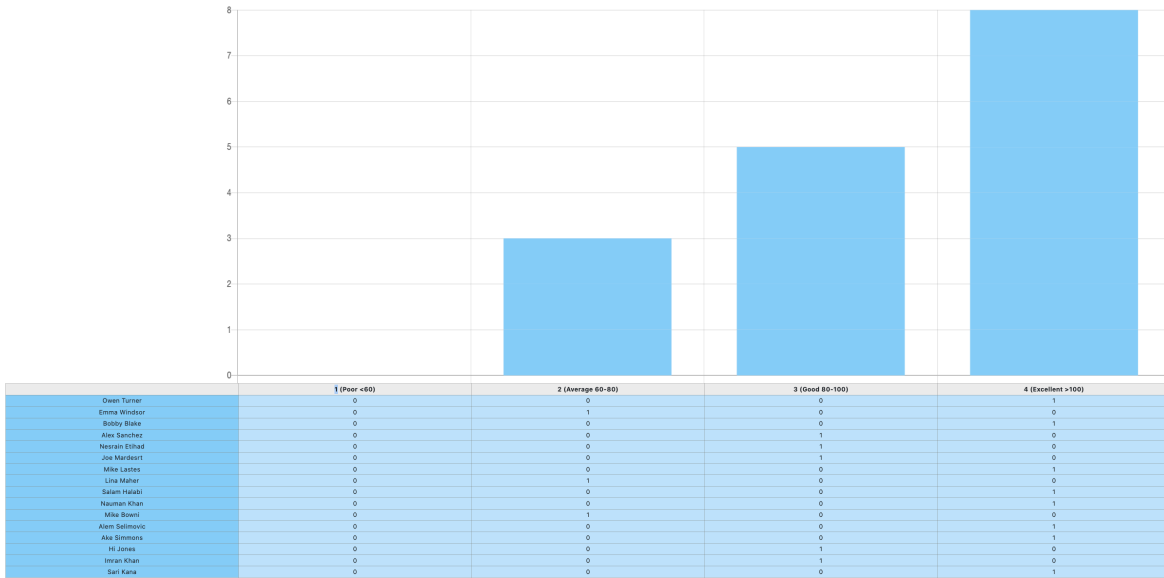
# Talent reports

See talent grouped by ratings – all fully configurable.



## Talent report ( Feb 2023 )

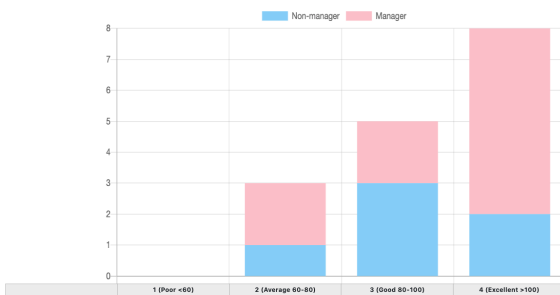
By user



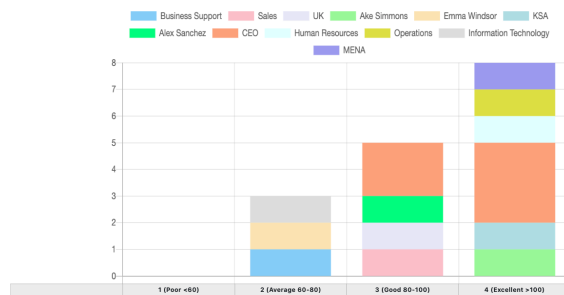
By various dimensions.



By manager



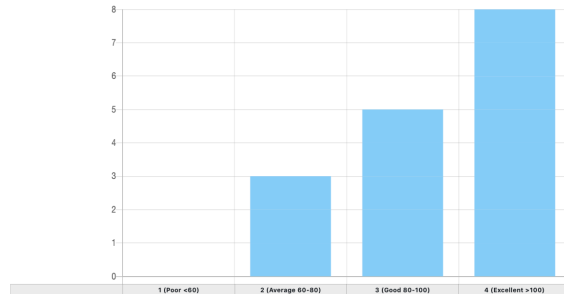
By team



By grade



By designation



# Bell-curves

See appraisals grouped on bell-curves.

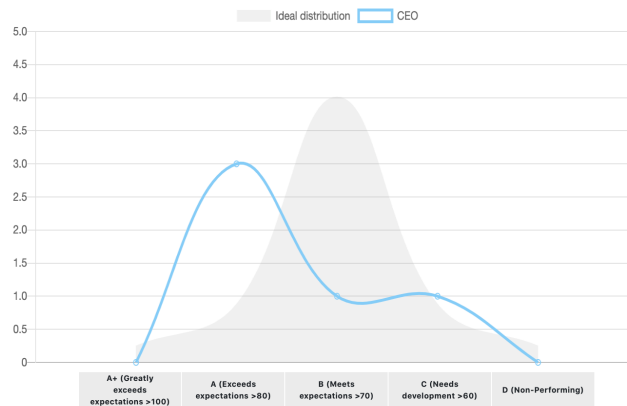
KPI Lens | CEO



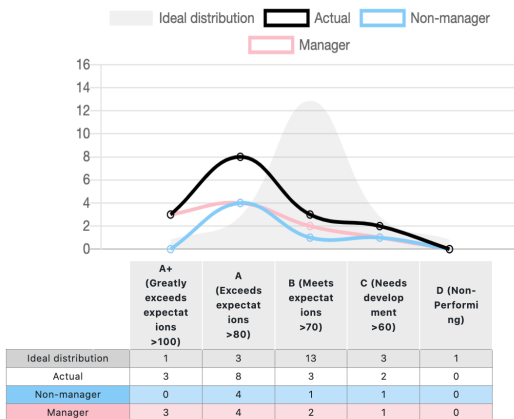
| Annual | Sub-team KPIs | Drill-down KPIs | 9-Box | Bell-curve |

## Bell-curve report ( Aug 2023 )

For team CEO only



### By manager / non-manager Subteams of CEO

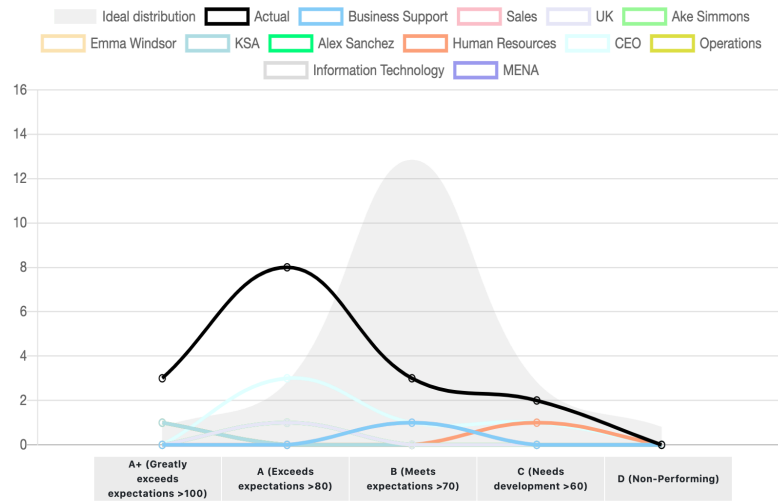


### By grade Subteams of CEO

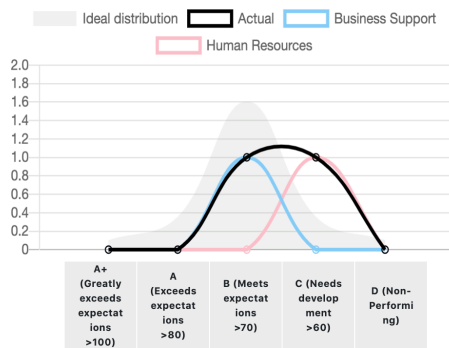




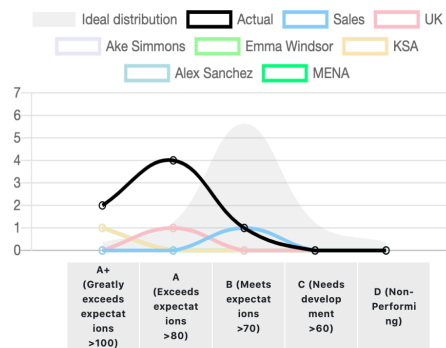
### Subteams of CEO (Level 1)



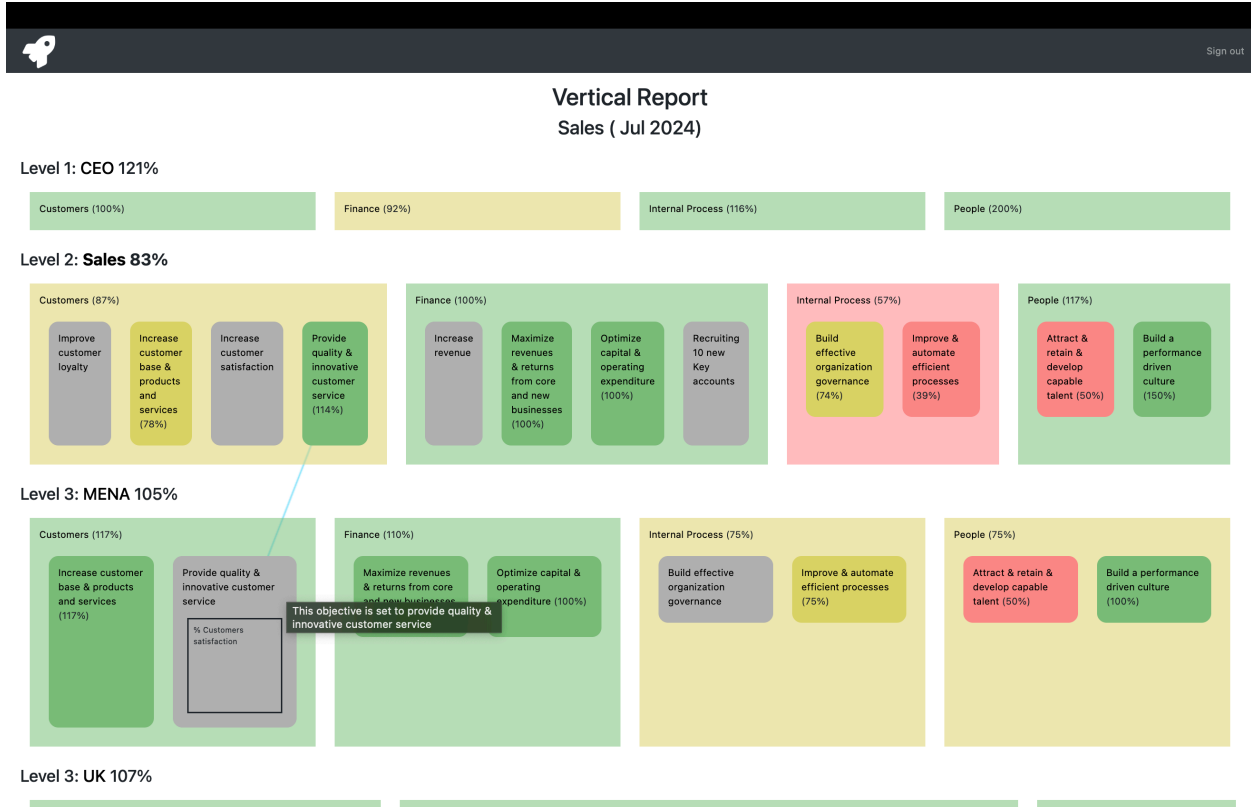
### Subteams of Business Support (Level 2)



### Subteams of Sales (Level 2)



## Vertical reports



Look up and down through your organisation by focusing on a team, perspective or objective (cascading by parent team objective links).

## Risk Management

### Risk Report

Risk and mitigations can be captured at Team, Project and Task level.

The risk items are then collated on a single Risk Report, summarizing the latest view on risk across the organisation.



### Risk Report (Jun 2022)

#### Team-level risks

Team	Key Achievements	Key Challenges & Risks	Outstanding Items	Required Decisions & Support
CEO	Revenue or sales you increased for the company. Money you saved for the company. Time you saved for the company. Problems you identified and solved. Ideas or innovations you introduced.	Failure to use appropriate risk metrics. ... Mismeasurement of known risks. ... Failure to take known risks into account. ... Failure in communicating risks to top management. ... Failure in monitoring and managing risks.	n/a	Sign-off on budget range. Org-wide comms to teams to buy in to process.

#### Project-level risks

Team	Objective	Project	Risk	Mitigation
CEO	Build a performance driven culture	Engagement Framework	- Inaccurate responses from survey participants - Limited budget to develop the framework and conduct the survey - Delay in Approval process	- Develop a comprehensive communication plan highlighting the ROI and benefits of the engagement framework - Third party to conduct the survey to ensure anonymity & confidentiality - Requesting internally streamlined approval process
CEO	Build a performance driven culture	Engagement Framework	- Inaccurate responses from survey participants - Limited budget to develop the framework and conduct the survey - Delay in Approval process	- Develop a comprehensive communication plan highlighting the ROI and benefits of the engagement framework - Third party to conduct the survey to ensure anonymity & confidentiality - Requesting internally streamlined approval process
CEO	Build a performance driven culture	Engagement Framework	- Inaccurate responses from survey participants - Limited budget to develop the framework and conduct the survey - Delay in Approval process	- Develop a comprehensive communication plan highlighting the ROI and benefits of the engagement framework - Third party to conduct the survey to ensure anonymity & confidentiality - Requesting internally streamlined approval process
Human Resources	Improve & automate efficient processes	Upgrading Performance Management System	Resisting change by middle management and other Senior staff	Increase buy-in throughout the project while supporting all teams

#### Task-level risks

Team	Type	Item	Note	Task Description	Task Comments
CEO	KPI	Total revenues from international market	I need to know why red	Forecast breakdown needed	Risk of allowed budget exceeding by \$56k - nauman.khan@thesolutioncrowd.com (20-Jun-2022 09:46)
CEO	KPI	Total revenues from international market	Please find attached latest report. Lorem_ipsum.pdf	Please breakdown by forecast	Budget forecast exceeds top range by \$56k - nauman.khan@thesolutioncrowd.com (20-Jun-2022 09:46)

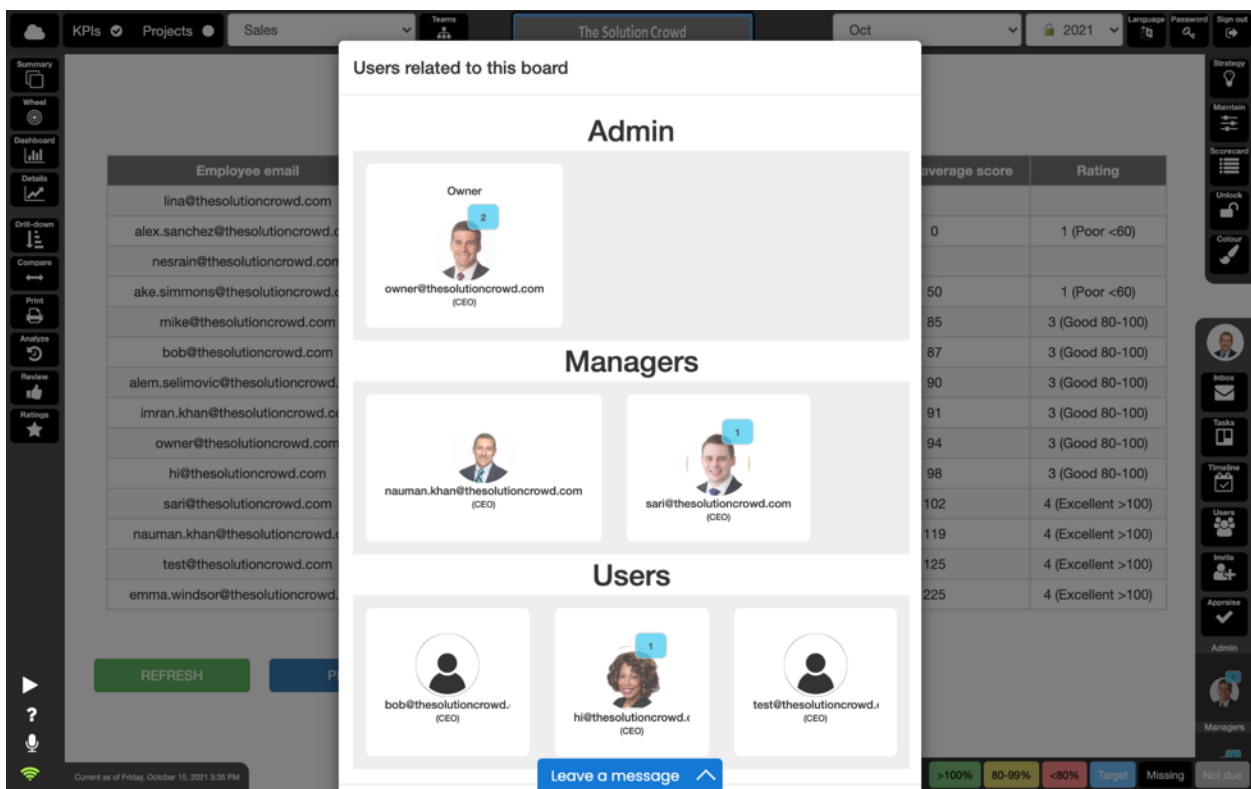
Generated: Mon Jun 20 10:33:12 UTC 2022

# Governance

All this is controlled with automated governance.

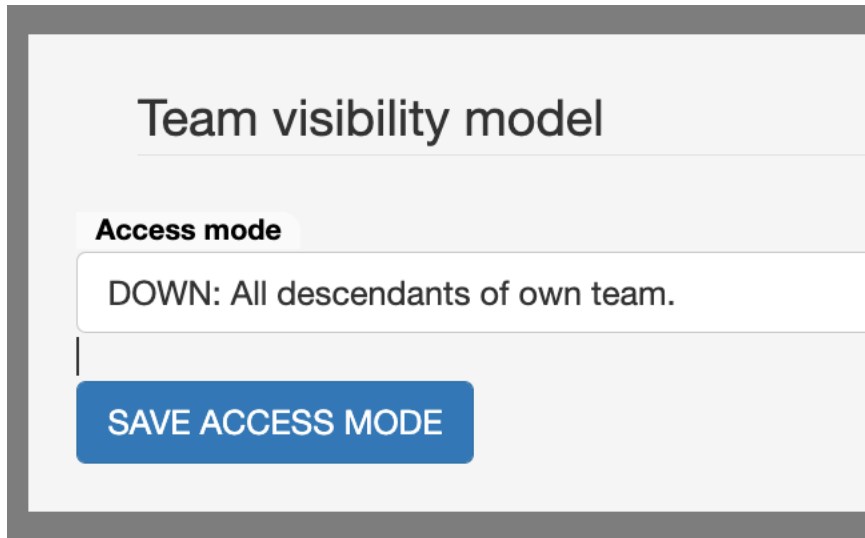
# Roles

Only the appropriate users, with the appropriate roles, for the appropriate teams can view and edit the appropriate information.

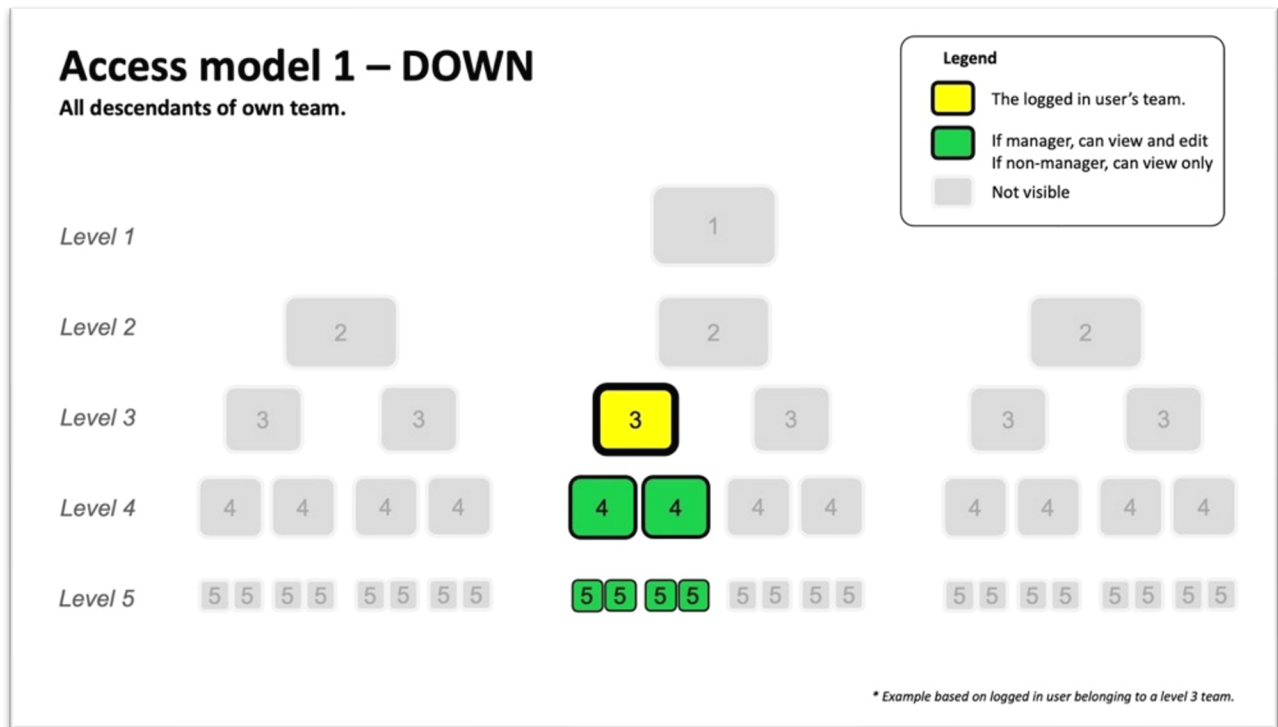


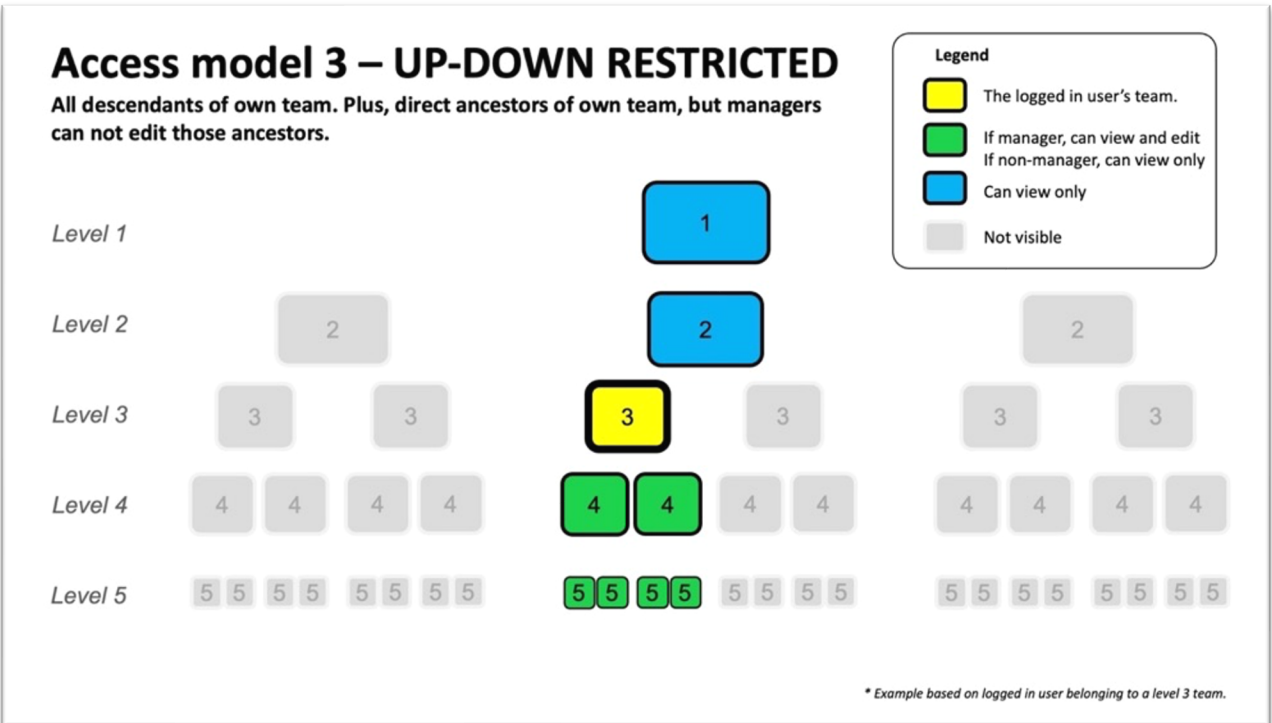
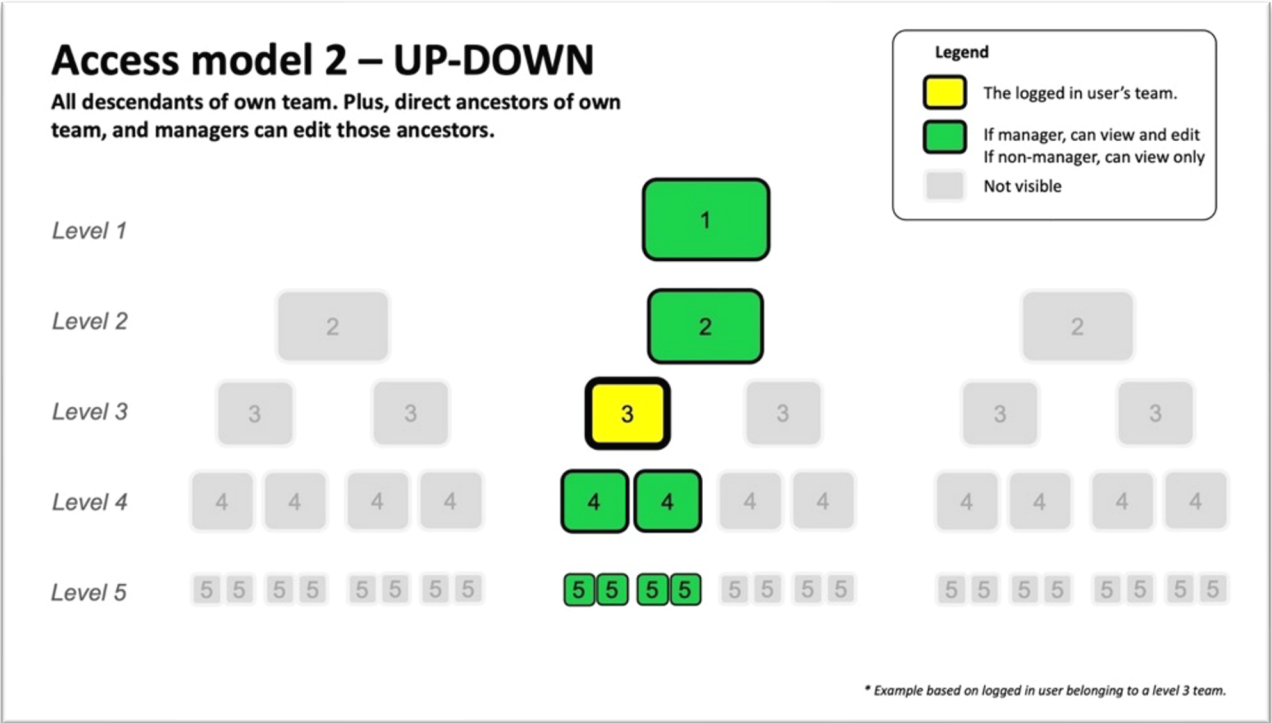
Managers have additional screen to perform HR functions.

Organisations can configure the access mode according to their company policy.



The 5 access modes are explained below. These can be customized further, as per specific requirements.





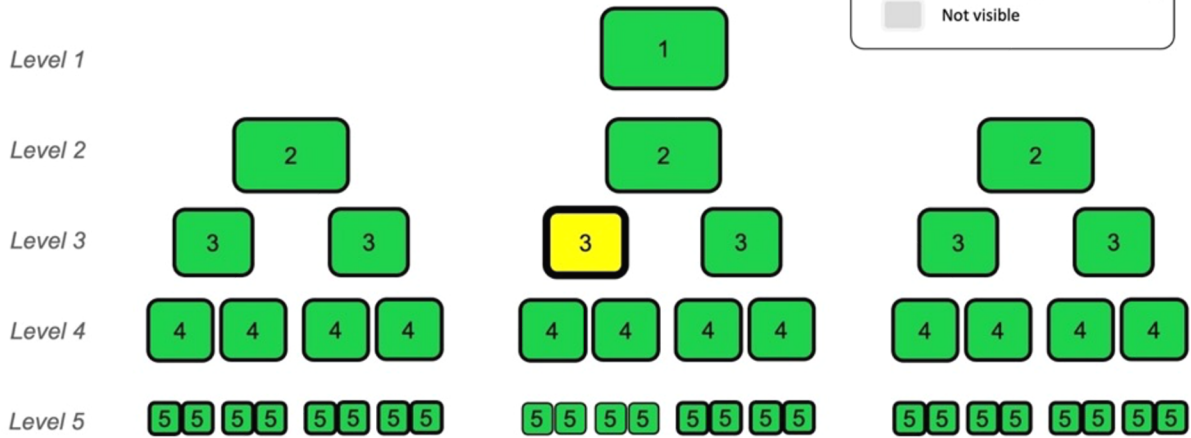


## Access model 4 – FULL

All teams, anywhere in the organisation. Managers can edit any team.

**Legend**

- The logged in user's team.
- If manager, can view and edit  
If non-manager, can view only
- Not visible



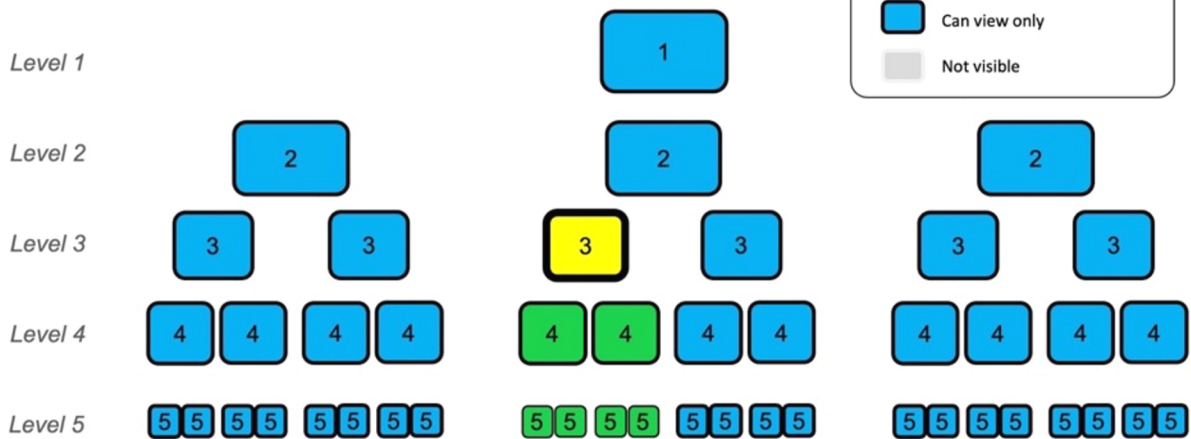
\* Example based on logged in user belonging to a level 3 team.

## Access model 5 – FULL RESTRICTED

All teams, anywhere in the organisation. Managers can only edit descendants of own team.

**Legend**

- The logged in user's team.
- If manager, can view and edit  
If non-manager, can view only
- Can view only
- Not visible



\* Example based on logged in user belonging to a level 3 team.



## Auditing

Every change is automatically audited in an immutable log.

System owners can review the system-wide audit log.

The screenshot shows the Kippy Settings interface. At the top, there's a navigation bar with 'KPIs', 'Projects', and 'CEO' selected. Below this is a 'Settings' section with a horizontal menu of tabs: 'Subscription', 'Teams', 'Users', 'Perspectives', 'Objectives', 'KPIs', 'Projects', 'Milestones', 'Competency', 'Tasks', and 'Audit'. The 'Audit' tab is active, displaying a 'Team Audit Log' table. The table contains four rows of audit entries, each with a user profile picture, email address, a description of the change, and a timestamp. The entries are:

User	Action	Timestamp
ake.simmons@thesolutioncrowd.com	Actual set for 2021 for period 10 to 1 on team Ake Simmons	Friday, October 8, 2021 12:13 PM
alex.sanchez@thesolutioncrowd.com	Actual set for 2021 for period 10 to 0 on team Alex Sanchez	Friday, October 8, 2021 12:11 PM
nauman.khan@thesolutioncrowd.com	Actual set for 2021 for period 12 to 0 on team Alex Sanchez	Friday, October 8, 2021 11:00 AM
nauman.khan@thesolutioncrowd.com	Actual set for 2021 for period 11 to 0 on team Alex Sanchez	Friday, October 8, 2021 11:00 AM

Below the table, it says 'Displaying last 500 audit rows.' and there is a 'Settings' button. At the bottom of the page, there is a 'Leave a message' button and a legend for performance metrics: '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.

An audit log of all changes with audit reports including:

- per KPI
- per Project
- per User
  - including when each user logged in
  - including changes to KPI's the user is an owner for.



Home | KPIs | Projects | u | Jun / Q2 / H1 | 2022

**Trial expires in 14 days. Click here to subscribe.**

### Details

Perspective | Objective | KPI  
Customers | o1 | k1

**Details**

Perspective: Customers

Objective: o1

KPI Name: k1

Owner: u

Weight: 1x

Unit:

Direction: Increase is better

Frequency: Monthly

Cumulative: Yes

**KPI Targets and Actuals graph**

**KPI Targets and Actuals table**

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Targets						100						
Actuals						90						
%						90						

fx : Increase is better : Cumulative : u

**History**

**Audit Log**

m@4bjun2022.com  
Actual set for 2022 for period 12 to on team u for k1  
Sat, Jun 4, 2022 12:42 AM

m@4biun2022.com

**New note for Jun / Q2 / H1 2022**

A B U I

Need help?

Legend: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), Not due (grey)


Admins | Users

Last update m@4bjun2022.com by 6 hours ago




History

Audit Log




**nauman.khan@thesolutioncrowd.com**  
Task deleted for 2021 period 2 on team CEO for Awareness has spread  
Saturday, September 25, 2021 4:33 PM

---




**nauman.khan@thesolutioncrowd.com**  
Task added for 2021 period 9 on team CEO for Awareness has spread  
Saturday, September 25, 2021 4:33 PM

---



**nauman.khan@thesolutioncrowd.com**  
Task deleted for 2021 period 2 on team CEO for Awareness has spread  
Thursday, August 12, 2021 8:22 AM

---



Every appraisal is logged.



KIPs Projects u

Jun / Q2 / H1 2022

**Trial expires in 14 days. Click here to subscribe.**

CANCEL SAVE COMPETENCIES

**History**

**Audit Log**

m@4bjun2022.com  
Appraised u@4bjun2022.com with Competency score 100%. Appraisal was based on a weighted score of 96, rating of 3 (Good 80-100) and feedback score of <empty>. The average KPI score was 90. The average Project score was <empty>. Communication Skills = '3. Meets Expectations'. Leadership = '3. Meets Expectations'. Decision Making = '3. Meets Expectations'. Customer Focus = '2. Needs Improvement'. Job knowledge = '3. Meets Expectations'. Initiative = '4. Exceeds Expectations'. Flexibility = '3. Meets Expectations'.  
Sat, Jun 4, 2022 7:33 AM

m@4bjun2022.com  
Appraised u@4bjun2022.com with Competency score 100%. Appraisal was based on a weighted score of 90, rating of 3 (Good 80-100) and feedback score of <empty>. The average KPI score was 90. The average Project score was <empty>. Communication Skills = '3. Meets Expectations'. Leadership = '3. Meets Expectations'. Decision Making = '3. Meets Expectations'. Customer Focus = '2. Needs Improvement'. Job knowledge = '3. Meets Expectations'. Initiative = '4. Exceeds Expectations'. Flexibility = '3. Meets Expectations'.

2022

Appraisals - View a user's feedback and performance across KPIs, Projects and Milestones. Provide general feedback and rate against core competencies.

Need help?

Legend >=100% 80-99% <80% Target Missing Not due

KPI Graphs



Staff Lens | Hi Jones (hi@thesolutioncrowd.com) 



[Acknowledge](#) | [KPIs](#) | [Annual](#) | [9Box](#) | [Review KPIs](#) | [Audit](#)

### User's Audit Report for Hi Jones (hi@thesolutioncrowd.com) ( Feb 2024 )

Modified on	Modified by	Team	Item	Message
03-Feb-2024 19:37:22	nauman.khan@thesolutioncrowd.com	KSA	OPEX budget performance	Note added for 2023 period Dec
14-Jan-2024 14:38:16	owner@thesolutioncrowd.com	Sales	Expansion International Action Plan	KPI approved
14-Jan-2024 14:38:16	owner@thesolutioncrowd.com	Sales	Expansion International Action Plan	Changed KPI details
14-Jan-2024 14:38:16	owner@thesolutioncrowd.com	Sales	Expansion International Action Plan	KPI moved
14-Jan-2024 13:48:45	owner@thesolutioncrowd.com	Operations	Efficiency Improvement Plan	KPI approved
14-Jan-2024 13:48:45	owner@thesolutioncrowd.com	Operations	Efficiency Improvement Plan	Changed KPI details
14-Jan-2024 13:48:45	owner@thesolutioncrowd.com	Operations	Efficiency Improvement Plan	KPI moved
14-Jan-2024 13:01:21	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 12 to 90
14-Jan-2024 13:01:21	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 11 to 90
14-Jan-2024 13:01:21	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 10 to 90
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 9 to 90
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 8 to 85
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 7 to 85
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 6 to 85
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 5 to 85
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 4 to 80
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 3 to 80
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 2 to 80
14-Jan-2024 13:01:20	owner@thesolutioncrowd.com	KSA	OPEX budget performance	Actual set for 2024 for period 1 to 80

## Change freezes and exemptions

Modifications and submissions are locked by the system, according to Plan and Actual submission windows which mandate

- who can change what
- when it must be changed by
- notifications, escalations, penalties for missed submissions
- exemptions for special circumstances, as authorized by the appropriate admin users with heightened permissions
-







## Period Lock Days

**Number of days after month-end**

**SAVE PERIOD LOCK DAYS**



# Inactivations

Inactivate KPIs, KRAs, objectives, projects and Teams by year.

The screenshot shows the 'Inactivate' interface with the following sections:

- Maintain Inactivate Objective:** Objective to inactivate: Optimize capital & operating expenditure. Inactive objective years: Inactive objective years. Button: SET OBJECTIVE.
- Bulk Inactivate Objectives:** Objectives to inactivate: Optimize capital & operating expenditure, Increase customer base & products and services, Teaching and Learnir. Inactive objective years: Inactive objective years. Button: SAVE OBJECTIVES.
- Inactivate KPI:** KPI to inactivate: Customer Acquisition Rate. Inactive KPI years: 2020,2021,2022. Button: SAVE INACTIVATE KPI YEARS.
- Inactivate Project:** Project to inactivate: Nothing selected. Inactive Project years: Inactive Project years. Button: SAVE INACTIVATE PROJECT YEARS.
- All inactivations:** < not loaded >. Button: GET INACTIVE ITEMS.

Objectives can also be inactivated in bulk (by multi-selecting objectives). The inactivation is cascaded down to all levels (based on the Parent Team Objective linking).



# Quick set-up

Use kippy to organically define your strategy and performance management. Contact us to help you import your existing data.

Import all your team KPIs in one go with a simple copy and paste from Excel.

Bulk import your existing kpi, projects, forecasts and actuals using a pre-built kippy excel template.

Quick Set

	Approved	Objective *	KPI Name *	Formula	Unit
1	<input type="checkbox"/>	increase profit margins	dx		\$
2	<input checked="" type="checkbox"/>	increase profit margins	Net Profit Margin		%
3	<input checked="" type="checkbox"/>	increase profit margins	Operating Profit Margin		%
4	<input checked="" type="checkbox"/>	increase sales for key product	% increased market share		%
5	<input checked="" type="checkbox"/>	increase sales for key product	DX		&
6	<input type="checkbox"/>	increase sales for key product	increase sales by 15% per year		\$
7	<input checked="" type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	Customer Lifetime Value (CLV)		Currency M
8	<input type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	New Business Acquisition Rate		Customers per month
9	<input checked="" type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	Return on Investment (ROI)	=CLOUD.KIPPY.SCORE.RANGE(20,80)	%
10	<input checked="" type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	Revenue Growth Rate		%
11	<input checked="" type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	عدد الموظفين الذين حصلوا على زيادة في المكافآت السنوية		عدد
12	<input type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	معدل زيادة المكافآت السنوية		%
13	<input checked="" type="checkbox"/>	Increase annual bonuses by 90% for 10% of sector employees	نسبة زيادة المكافآت السنوية للموظفين		%
14	<input type="checkbox"/>	Increase customer retention	Customer Retention Rate		%

SAVE CANCEL ADD ROW

Need help? ^

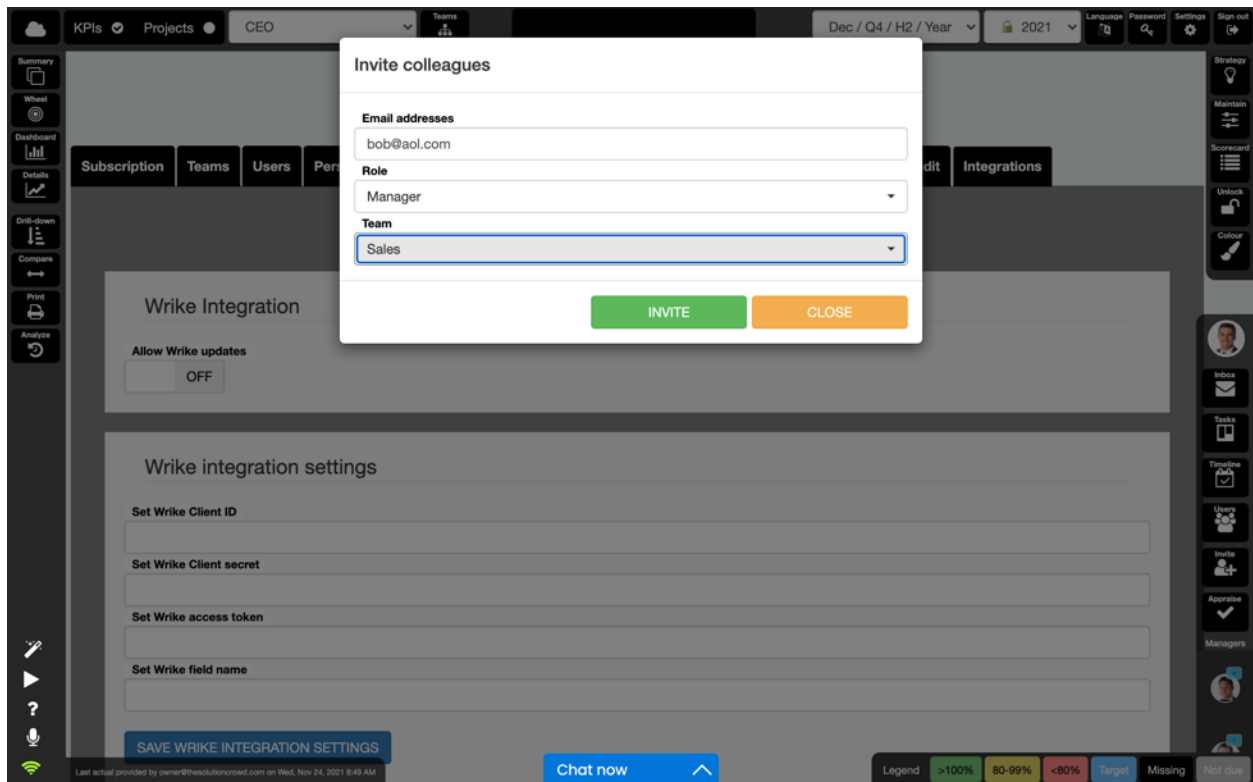


The screenshot shows the Kippy Settings interface. At the top, there is a navigation bar with a hamburger menu, 'KPIs', 'Projects', a user dropdown set to 'CEO', 'The Solution Crowd', a date dropdown set to 'Feb', and a year dropdown set to '2024'. Below this is a secondary navigation bar with 'Home', 'Analyze', 'Collaborate', 'Reports', 'Tools', and 'Help'. On the right side of this bar, there are two notification badges: '87 unapproved KPIs' and '2 self-appraisals to review'. The main heading is 'Settings', followed by a sub-heading 'Setup'. Below 'Setup' is a horizontal menu with tabs: 'Setup', 'Config', 'Subscription', 'Teams', 'Users', 'Perspectives', 'Objectives', 'KPI', 'Projects', 'Milestones', 'Competency', 'Tasks', 'Audit', 'Integrations', and 'Reports'. The 'Setup' section contains two main areas: 'Import team' and 'Set up mode'. The 'Import team' section has a yellow instruction box: 'Download the kippy template, populate it with all the data for this team and upload it all in one go.' Below this, it says 'Please upload a kippy template' with a green badge. There is a file upload field with a 'Choose file' button and 'No file chosen' text, and an 'UPLOAD' button. The 'Set up mode' section has two toggle switches: 'Unlock all planning and actual submissions' (set to OFF) and 'Show quickset up for managers' (set to ON). At the bottom of the settings panel, there is a 'Need help?' link with an upward arrow.

## User management

Simple in-app management

Manage users in app (or Integrate with your internal JML “joiner-move-leaver” process).



Invite additional users to teams with particular roles. Invitations based on inviters role and cascading privileges.

Users can be added with alias email addresses, as silent (so not receive any email notifications) and as unlicensed users (who can be managed in the system but not login themselves).

Users can use their alias email address as the login username.

View all users in one report.



### User Report

#### Kippy Users ( 15 )

Name	Email address	Role	System Owner	Team	Alias	Tree depth	Grade	Additional user info
Nauman Khan	nauman.khan@thesolutioncrowd.com	Manager	No	CEO	norm_khan@hotmail.com			
Hi Jones	hi@thesolutioncrowd.com	User	No	CEO				
Emma Windsor	emma.windsor@thesolutioncrowd.com	User	No	Emma Windsor				
	test@thesolutioncrowd.com	User	No	CEO				
Sari Kana	sari@thesolutioncrowd.com	Manager	No	CEO				
Lina Maher	lina@thesolutioncrowd.com	Manager	No	Business Support				
Ake Simmons	ake.simmons@thesolutioncrowd.com	User	No	Ake Simmons				
	owner@thesolutioncrowd.com	Manager	Yes	CEO				
Alem Selimovic	alem.selimovic@thesolutioncrowd.com	Manager	No	Operations				
Imran Khan	imran.khan@thesolutioncrowd.com	Manager	No	UK				
Mike Lastes	mike@thesolutioncrowd.com	Manager	No	Human Resources				
Alex Sanchez	alex.sanchez@thesolutioncrowd.com	User	No	Alex Sanchez				
Nesrain Etihad	nesrain@thesolutioncrowd.com	Manager	No	MENA				
Bod Black	bob@thesolutioncrowd.com	User	No	CEO				
Joe Mardesrt	joe@thesolutioncrowd.com	User	No	CEO				

Back [Print](#)

Generated: Wed Jun 22 19:28:14 UTC 2022

## Manage your own user profile

KPIs Projects CEO The Solution Crowd Sep / Q3 2022

### My profile

Email nauman.khan@thesolutioncrowd.com  
 Role Manager  
 User's team CEO  
 Alias norm\_khan@hotmail.com

Name Nauman Khan  
 Grade Exec  
 Designation CEO  
 Tree Depth

[EDIT PROFILE](#)

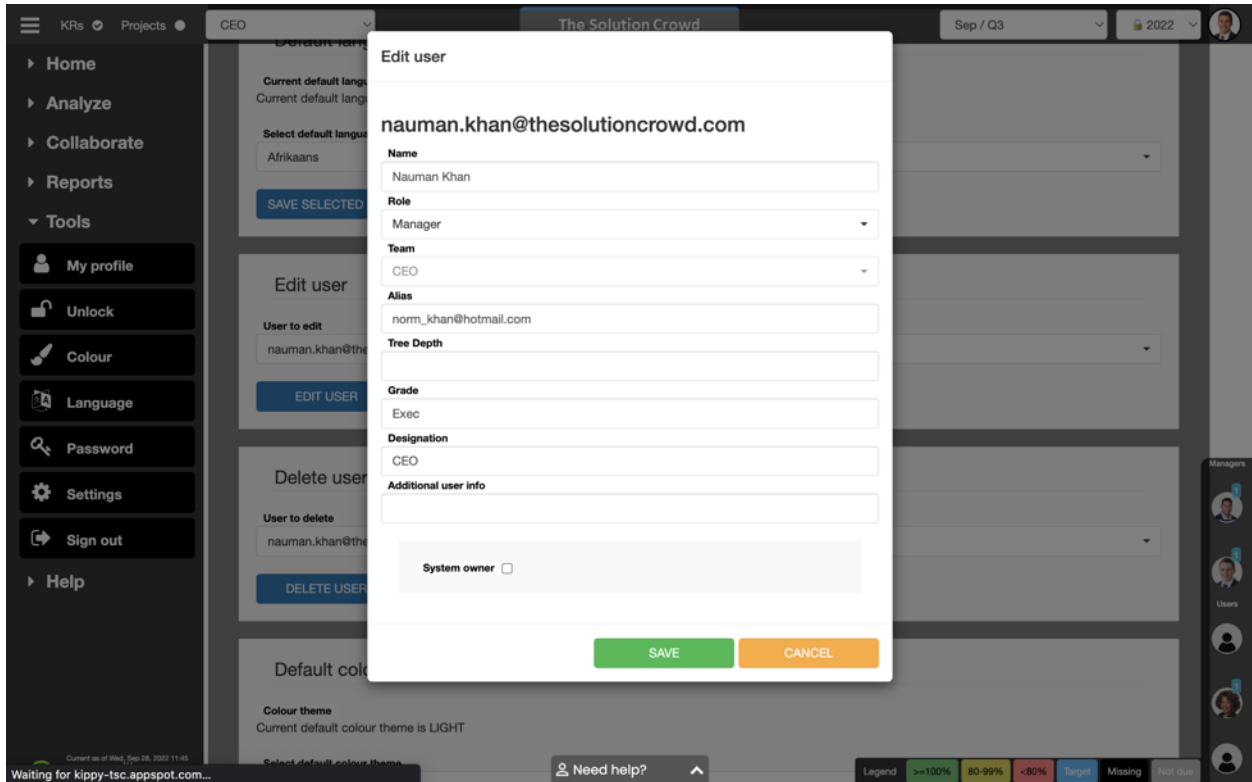
Voice-activated presentation mode

Profile picture  
 Choose file No file chosen

Need help?

Legend >=100% 80-99% <80% Target Missing Not due

## Manage profile of your teams' users



## Augment dashboards with additional user info





## Tree depth

Configure amount of information shown to each user by team level.

This is useful if certain users don't want to be overloaded with low-level data.

For example, in an organisation with 7 levels - if CEO tree depth equals 3, CEO will only see Level 1, 2 and 3 information.





# Reminders


The system sends automatic reminders, including optionally escalating to managers.

**kippy Support** 2 October 2021 at 13:02 S

Reminder

To: [nauman.khan@thesolutioncrowd.com](mailto:nauman.khan@thesolutioncrowd.com)

## Reminder



Please update last months actuals for the following items

Team	Project Milestone or KPI	Name
CEO	KPI	Invite new prospects

Log in

If you need more help, email us at [support@kippy.me](mailto:support@kippy.me)

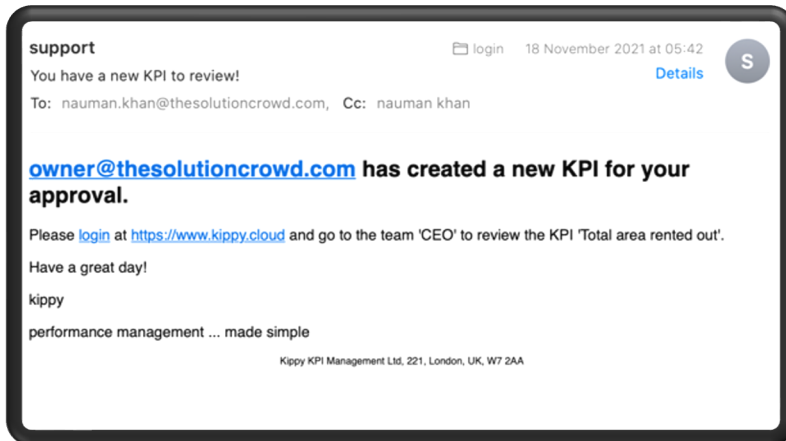
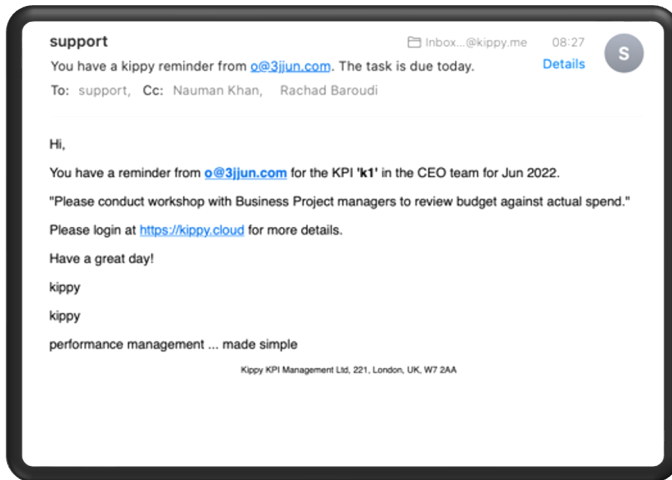
Click here to [unsubscribe](#) from these emails.

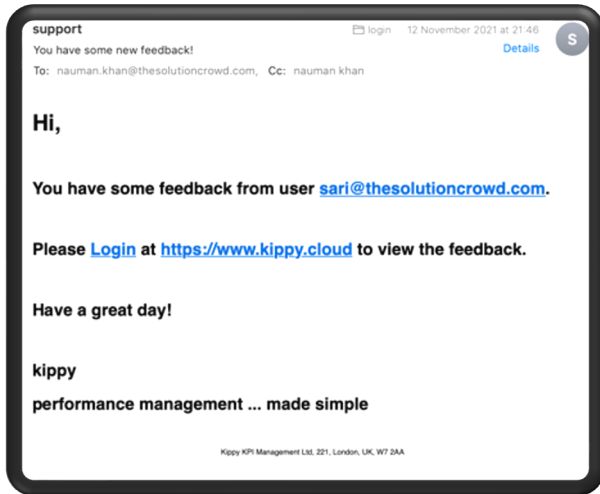
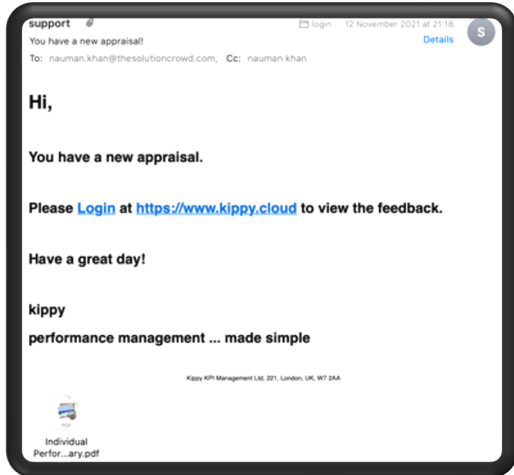
Kippy KPI Management Ltd, 221, London, UK, W7 5AA

# Notifications

By default, the system sends employees email notifications in numerous scenarios, including:

- Late or overdue actual submissions
- Reminders of tasks based on reminder dates and due dates
- Draft KPIs needing approval
- Approved KPIs needing update
- Self-appraisals to managers
- Appraisals by managers
- Notes attached to KPIs and Projects of interest to the employee
- Feedback received





Each user can also set a “Silent mode” in their user profile, so they do not receive kippy notification emails.



## Hosting options

All this provides a solution that is:

- A flexible appraisal mechanism for all staff, at any cadence, fully aligning everything top-down and bottom-up
- An always live view of corporate health by every dimension with data accuracy
- A low-friction framework for continuous improvement

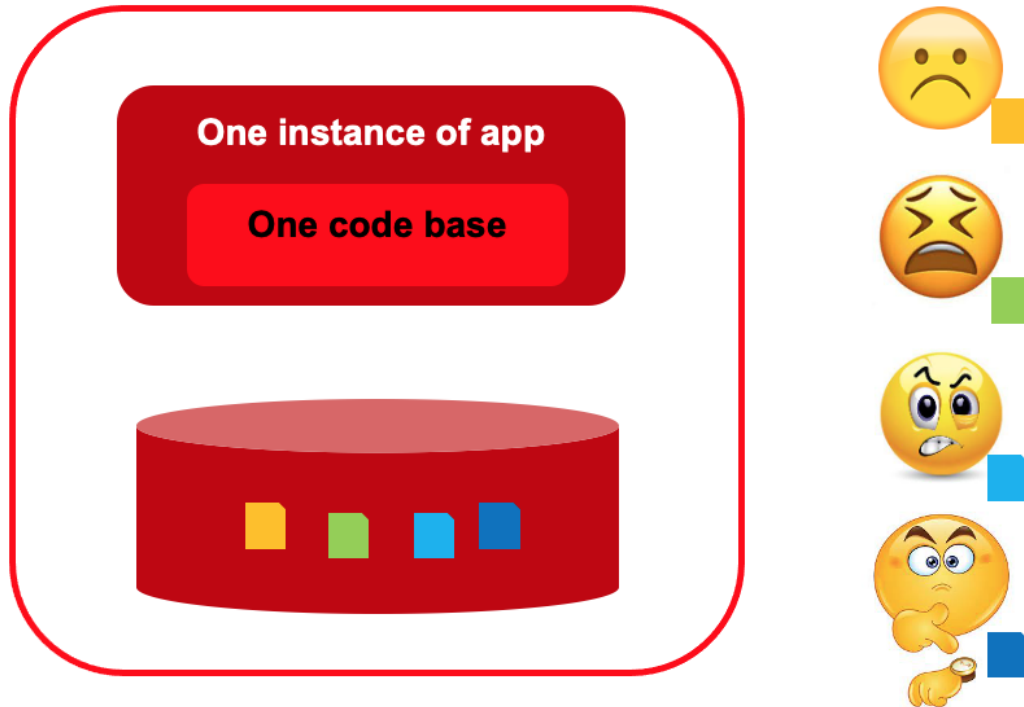
From a technical perspective, kippy is unique in that it does NOT provide a rigid Commercial off-the-shelf product.

Instead, a totally standalone kippy instance will be deployed to a cloud or infrastructure of your choosing.

As well as configuration of the capabilities, the code for the core product will be branched just for you, allowing any low-level changes to be made specifically for you.

Other SaaS providers have one product for all their clients. They usually segment the data - but the app and features remain identical for all clients. A one-size fits all solution!

## Other SaaS solutions



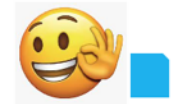
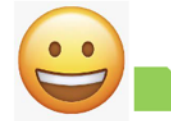
What does that mean for you? You have to put your requirements in a shared backlog for all your clients. You have to wait for the next major release. You have to do workarounds in your business processes to fit the constraints of their product.

What approach does kippy take? We deploy your very own isolated instance. We create bespoke functionality to perfectly fit your needs (and then later putting them behind feature switches for everyone else).

What does this mean for you? You don't have to put your requirements in a shared backlog for all our clients. You don't have to wait for our next major release. You don't have to do workarounds in your business processes to fit our product.



# kippy cloud solution





## Web APIs

This isolation increases agility, and so do the kippy web APIs. Every activity in the kippy user interfaces can also be performed by invoking simple web APIs, so information can be automatically pushed and pulled from and to any system.



What does this mean for you? You can easily pull in employee performance for a specific set of KPIs from any tool or system used in your organisation. You can push any appraisal, discussion, report, etc. to any other tool or system used in your organisation.

More details on the APIs available here <https://www.kippy.cloud/api>

# Functions

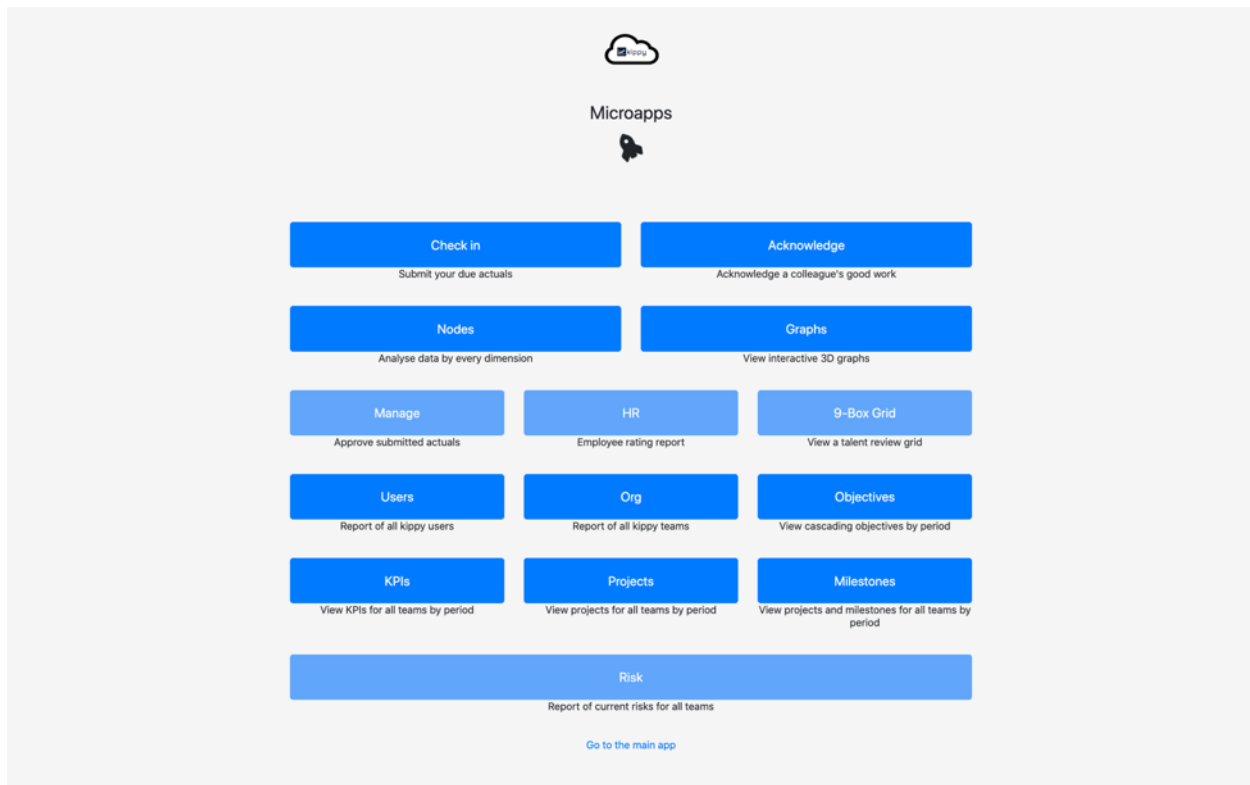


Pull and transform data without coding or support from IT. Dynamically set your actuals by referencing other KPIs with functions like add, subtract, multiply, divide, percentage and average.

Need a new function or adapter, we'll make it for you. Want to code your own, we'll host it for you. Want to host it yourself, we'll call it as needed. Want to push the values, call our APIs. Whatever your use case, we've got you covered!



# Microapps



No matter how great a dashboard, report or app user interface is, it will never be perfect for every persona, in every company, in every situation.

Kippy comes with great user interfaces by default, but also lets you create user specific micro-apps with custom reports and dashboards, geared exclusively to a particular person, for a specific use case, just for your organisation.

So don't just use your tools, love them!

## Dedicated environments



Need one or more non-prod environments? Spin up as many non-prod environments as you need - in minutes!

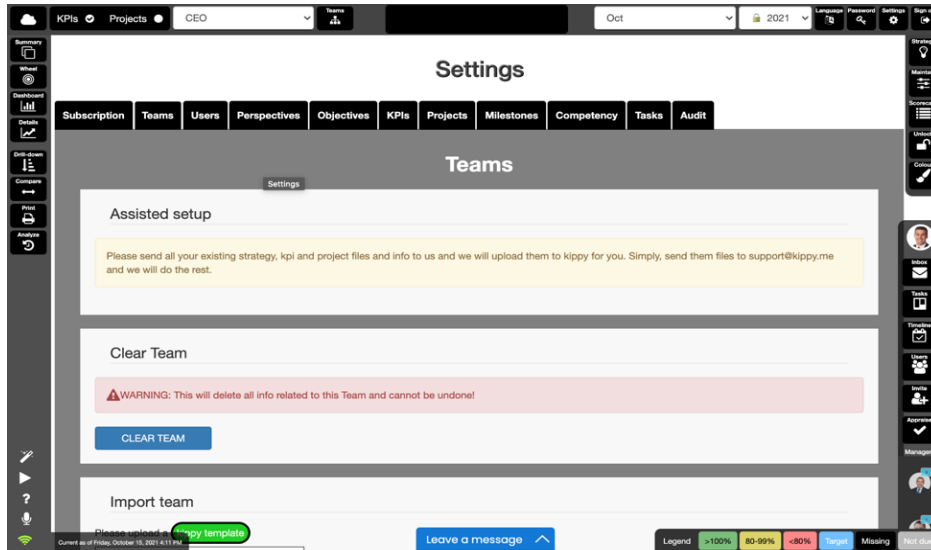
Your Kippy instance can be deployed to

- the shared Google Cloud (in London),
- in other Google Cloud AppEngine instances around the world,
- on other cloud providers,
- on your hosting partners infrastructure
- on your own infrastructure

Your kippy instance can also be deployed with different configurations for high-resilience and failover.

# Fully configurable

Everything in kippy is self-configurable via the in-built admin console.



This includes

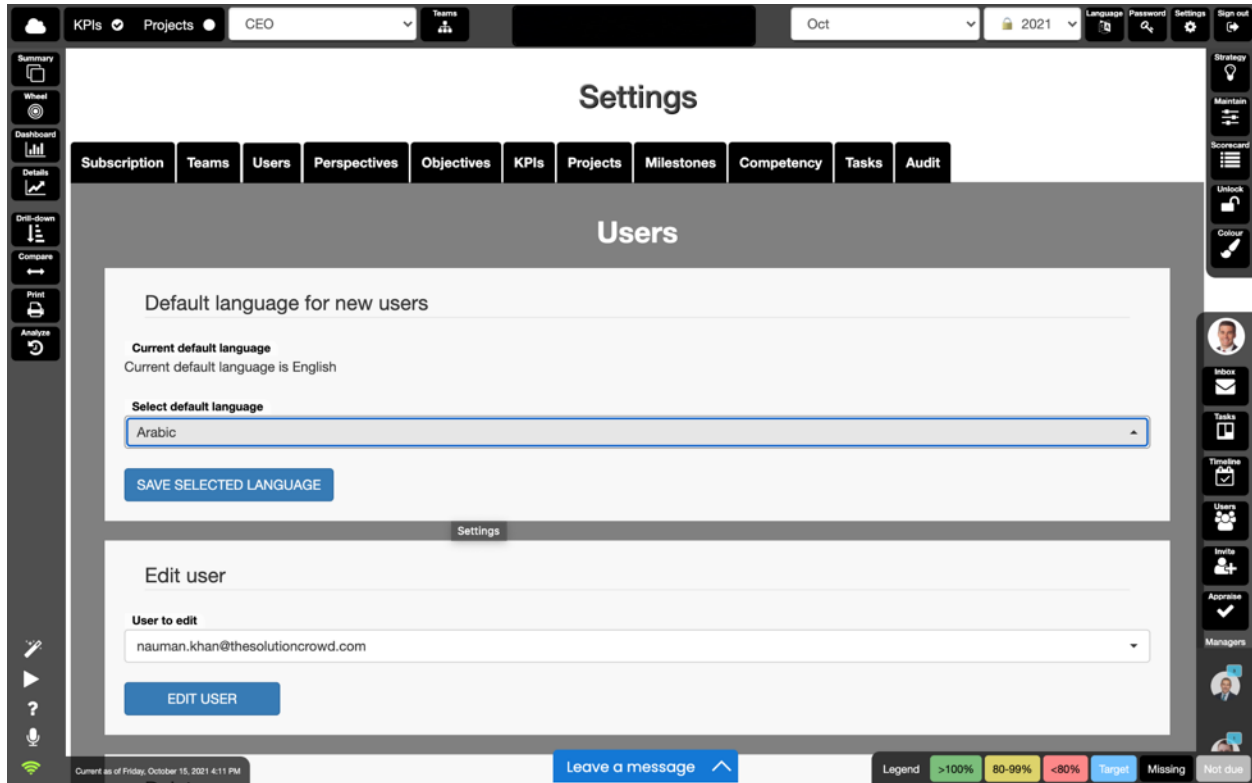
- changing 1x,2x,3x to greater than 3 (e.g. 1x to 100x)
- locking appraisals
- complex weighting and score calculation configuration
- changing default language and color themes
- resetting passwords
- full user management
- edit, rename, move and delete perspectives, objectives, KPIs, projects and milestones
- appraisal competencies with descriptions and weighting
- feedback criteria
- temporarily disabling appraisals for the whole organisation
- workflow of task Kanban columns
- no-code system-to-system integration (see Wrike demo, JD Edwards demo, Microsoft Dynamics 365 demo)
- the list of values in each competency drop down in the appraisal screen
- set new KPIs, objectives, projects to be inactive by default for previous years
- modifying the start of org reporting cycle e.g. 'January to December' becomes 'April to next March'.
- restrict all KPI scores between 0 and 100.
- set the upper and lower bound of that restriction for all KPIs (i.e. from 0 and 100 to other numbers)
- change the days after month reminders should be sent on
- set the days that reminders should also be escalated to the KPI/KR owners manager
- change the score thresholds for the RAG (red amber green) status for KPIs and Projects

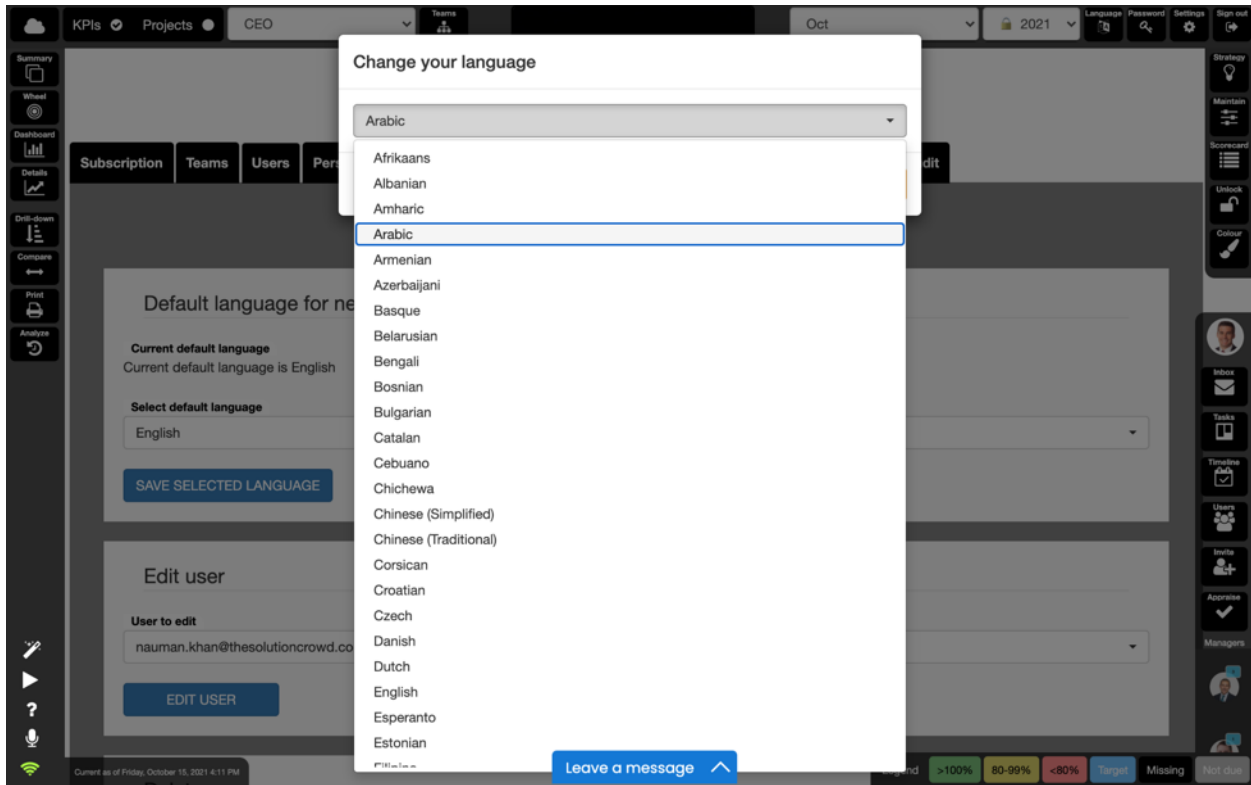


- allow managers to quick set up
- ensure managers set appraisal notes before saving appraisal
- allow full unlock of the system whilst setup is being completed
- calculating non-cumulative KPI/OKR scores on the last score vs the average of the scores that year to date.

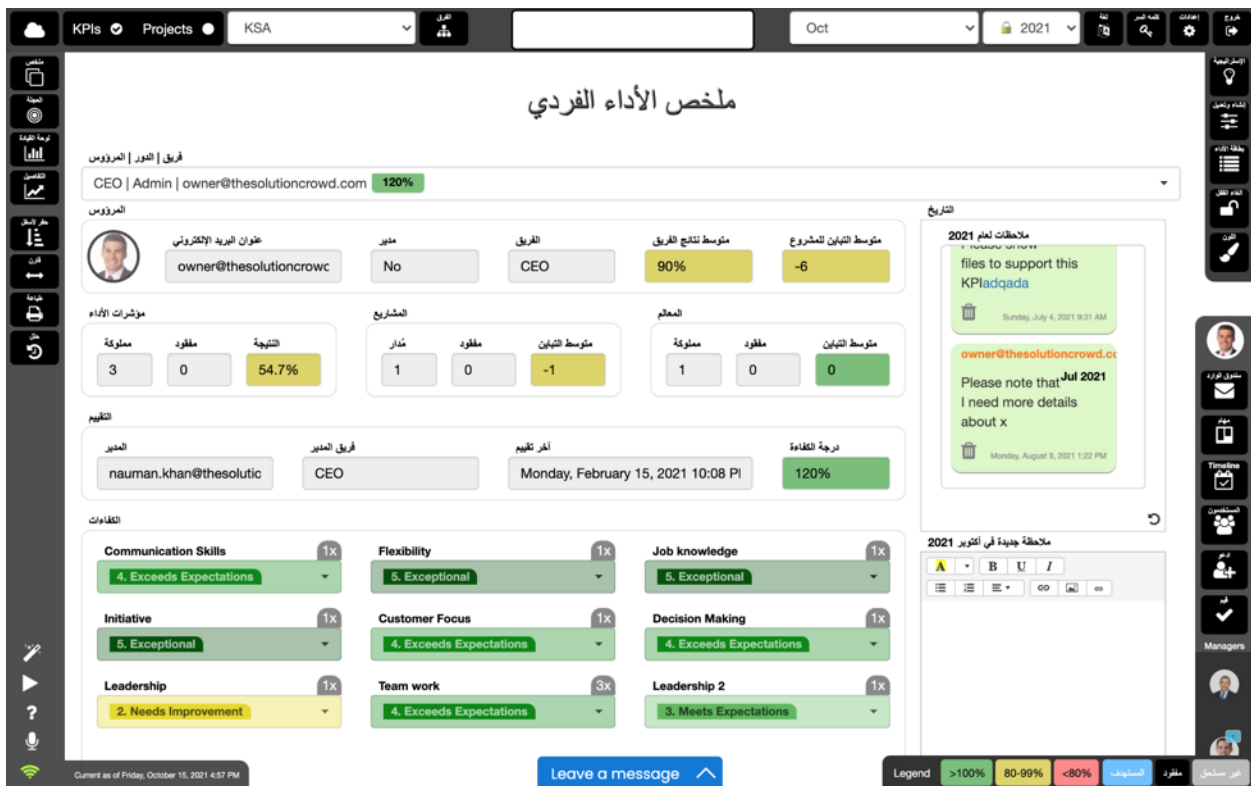
# Multi-language

Kippy is available in over 100+ languages, including English and Arabic. The language can be defaulted to the whole organisation. Plus, each user can flip between languages as needed.





All screens and help have already been translated to Arabic and verified by a native Arabic speaker.



KPIs Projects KSA
Oct 2021

## تفاصيل المؤشرات

المنظور | الهدف | المؤشر

Customers | بناء ثقافة مدفوعة الأداء | عدد العملاء الذين تزيد مبيعاتهم عن مليون

الهدف

بناء ثقافة مدفوعة الأداء

اسم المؤشر

عدد العملاء الذين تزيد مبيعاتهم عن مليون

الملك

nesrain@thesolutioncrowd.com

الاجتهاد

Increase is better 3x

التكرار

Semi-annual No

الوحدة

\$

مصدر البيانات

Oracle ERP

الرسم البياني لمستهدفات مؤشر أداء والقيم الفعلية

الشهر	H1	H2
المستهدفات	50	75
الظعية	49	76
%	98	101

\$: 3x : Increase is better : Not cumulative : nesrain@thesolutioncrowd.com

التاريخ

سجل الملاحظات

owner@thesolutioncrowd.com

بناءً المبيعات تراكمية؟ Oct 2021

Friday, October 15, 2021 4:58 PM

ملاحظات

Leave a message

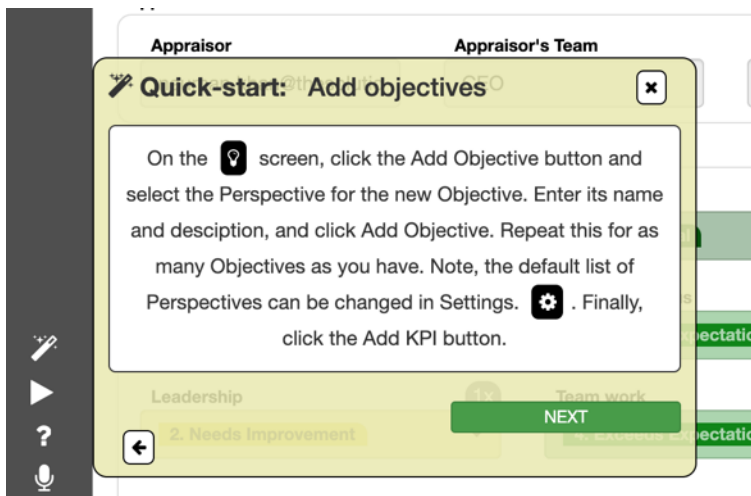
Legend >100% 80-99% <80% مستهدف منظور

# Help

All labels come with helpful help text on mouse hover.



In-context help and bi-directional chat window for support.







**Leave a message**

There are no agents available right now to take your call. Please leave a message and we will reply by email.

Name

Email

or sign in with:

Message

**Send**

Powered by mylivechat



**Chat now**

**Nauman**  
Nauman

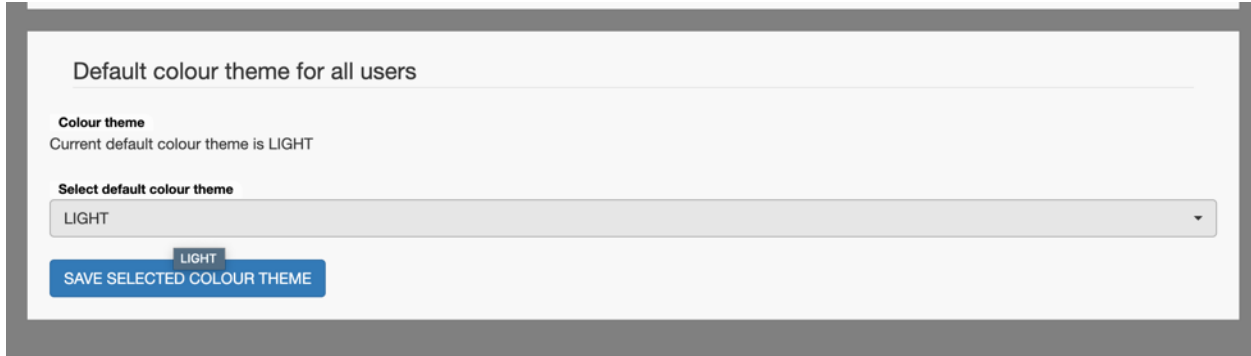
Hi, Please let me know if you have any questions or need any help getting set up.  
Thanks, Nauman

Type your message here...

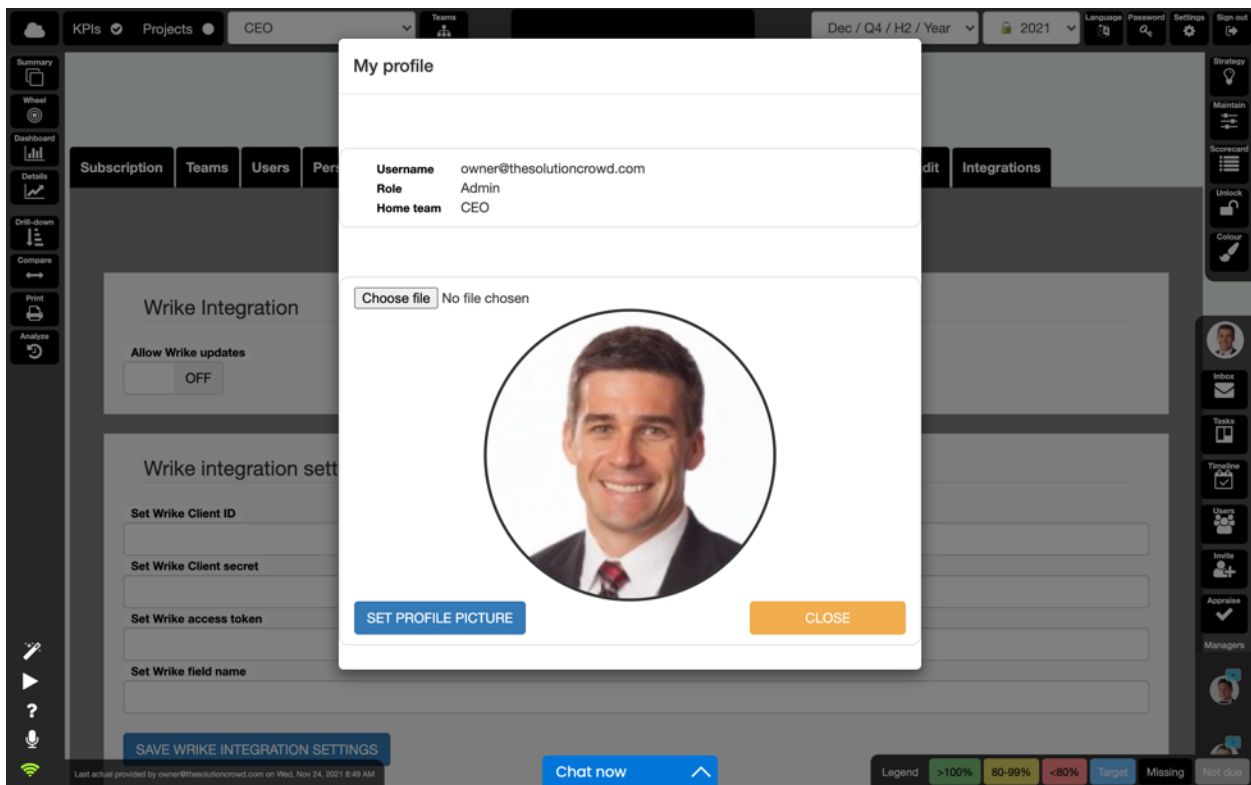


# Personalisations

The system comes with multiple configurable colour themes. Users can personalize colours.



Set user profiles or let users self manage.



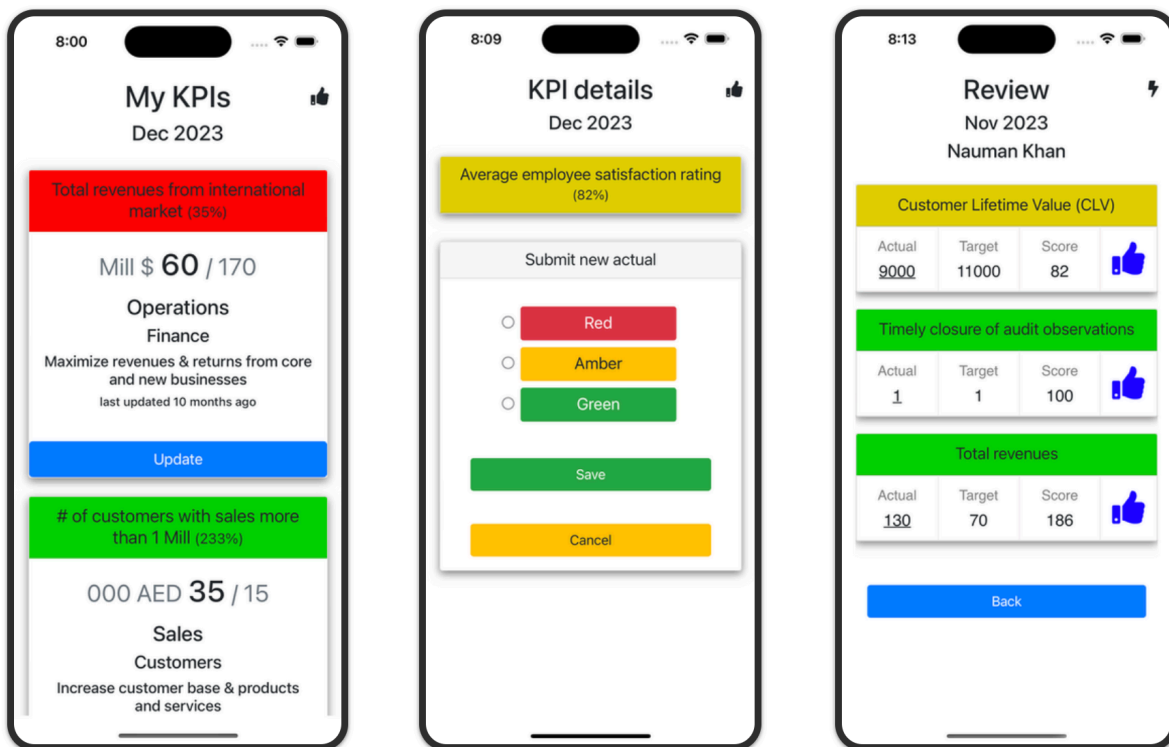


## Mobile responsive

All screens are mobile-responsive, scale up and down with browser zoom and are optimized for smartphones, tablets, laptops, desktops and extra large screens for presentations and dashboards. Available on iPhone and Android. All browsers supported.

## Mobile app

Download the iPhone app from the Apple AppStore for a quick and easy way for staff to submit due KPI actuals and managers to review them.





# Navigation

## Voice control

Change screens using your microphone.

### Kippy - Voice Commands - Cheat Sheet

Click the microphone icon and clearly say one of the commands below.

<b>Helpful phrases</b> What can i say What can i ask Open quick start How to Help	<b>View screen</b> Dashboard Executive summary Wheel Scorecard Compare Analyse Print Show teams View users	<b>Personalize</b> Logo Profile picture Password Background colour
<b>KPIs and Projects</b> Show <kpi name> Show <project name> Next Previous  Create new KPI Create new project Maintain  Projects mode Kpi mode	<b>Change view</b> Change the reporting period to <month> Show next year Show previous year  Go to <team name> team	<b>Admin commands</b> Show the audit Unlock plans and actuals  Or, say 'Settings for' followed by : Teams Users Perspectives Objectives KPIs Projects Milestones
<b>Invite colleagues</b> invite user	Voice commands only work on Google Chrome – which will ask 'to use the microphone'.	After a prolonged period of silence, the mic will automatically turn off.

## Keyboard shortcuts



Shortcut to screens by pressing Shift and Function keys:

- F1 Strategy
- F2 Teams
- F3 Summary
- F4 Wheel
- F5 Dashboard
- F6 Scorecard
- F7 Details
- F8 Maintain
- F9 Drill down
- F10 Inbox
- F11 Tasks
- F12 Timeline

## Tactile dashboards

Re-size dashboards and graphs by double-clicking, dragging, mouse wheel for zoom, etc.



## Customisations

The system is integrated with OAuth2.0 identity mechanisms (including Google Login and Slack Login) and can be easily integrated with Microsoft Active Directory.

The system is integrated with SendGrid for emails and can be easily integrated to include notifications via SMS and other email servers including Exchange.

The system is horizontally scalable (without limit) on Cloud infrastructure with automatic upscaling and downscaling of resources based on user demand.

As well as building adapters and interacting with web APIs, it is also an option to buy a licensed copy of the source code and extend the product with your own internal technology teams, without or without help from the kippy build team.

Various documented use cases are available for interacting with external and internal Enterprise systems such as Power BI, Sharepoint, Microsoft Team Foundation Server, Trello, Google Sheets, Google Translate, Slack and Zapier - which can be used to easily connect to Oracle ERP and other business intelligence tools.

Online assisted and non-assisted courses are already available on kippy methodology and tooling for users and admins, in English and Arabic. On-premise training is available.

Detailed use cases available on [www.kippy.cloud](http://www.kippy.cloud) for using web APIs for data exports.

<https://www.kippy.cloud/web-api-integration-with-sharepoint>

<https://www.kippy.cloud/automate-your-business-processes>

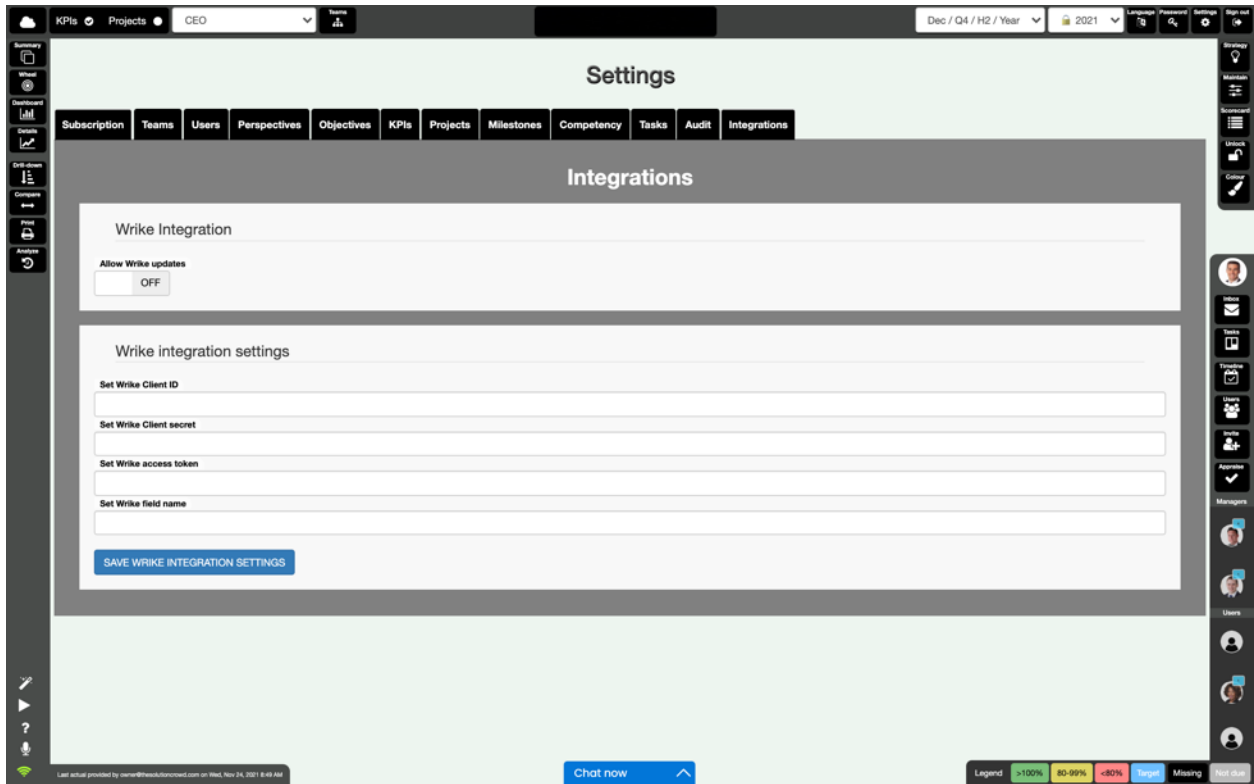
<https://www.kippy.cloud/system-to-system-updates>

<https://www.kippy.cloud/functions-adapters-and-integrations>



# Built-in integrations

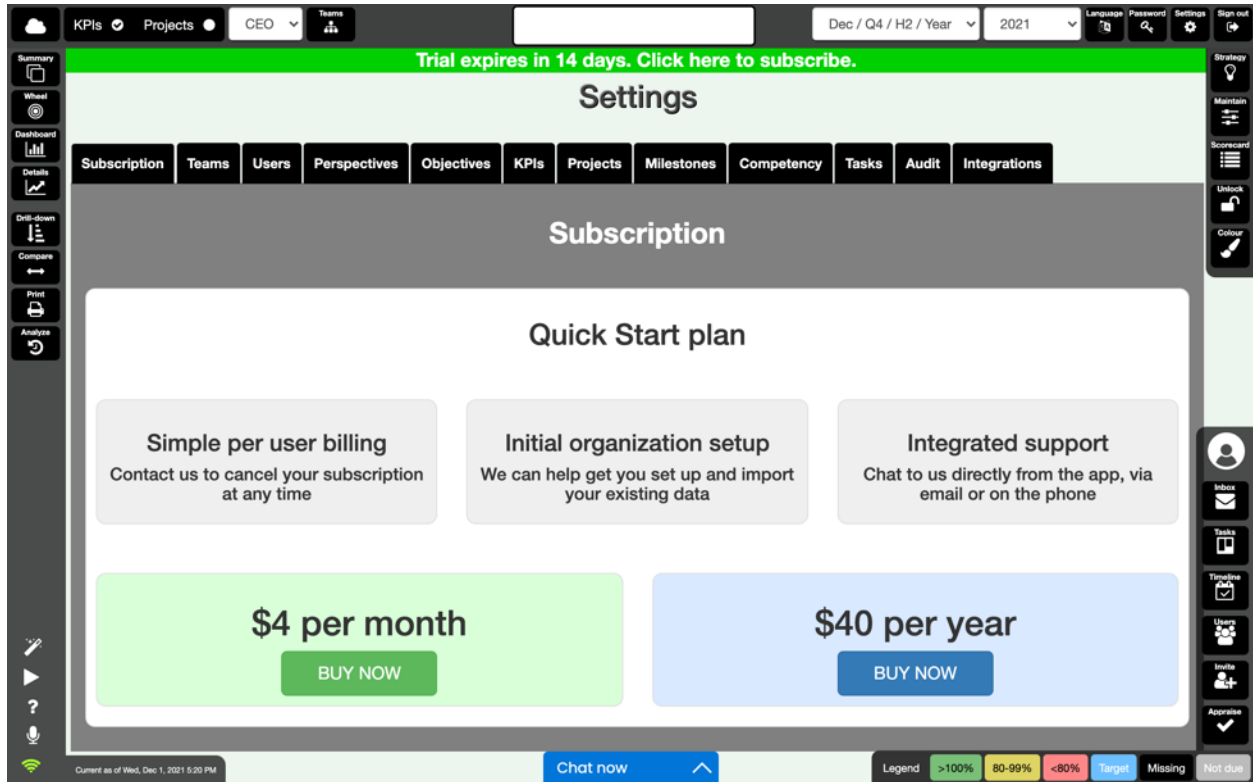
Several configurable integrations are already built-in, and can be enabled for our Enterprise customers. Please get in touch to learn more.





# Billing

Subscribe in-app with simple per user billing (monthly or annually).



Invoice based billing available for bulk and enterprise usage.



# Security

- We will not share your data with anyone EVER!
- Kippy Cloud is hosted on Google Cloud Engine in the zone europe-west2, with access extremely restricted - no data is stored on any other physical servers. Please visit <https://cloud.google.com/compute/> for more information
- All data is encrypted in transit and at rest.
- KPI performs regular security and vulnerability audits, checks and monitoring.
- Identity and integration is always done, at a minimum, using OAuth2.0 authentication and https.
- All data is encrypted with the encryption keys stored securely. In the case of a breach, we will notify the affected parties. Customers SOC integration can also be configured upon request.
- Similar principles would be applied for customized hosting.
- KPI Cloud is built with multi-tenancy from the ground up, so your data is segregated at all tiers, ensuring only you can see your data.
- Access to data is further restricted by role-based access controls within your organisation and teams - ensuring users can not unintentionally see each other's data.
- If you stop your subscription, kippy will change your access to read-only for a period of 90 days, during which you will not be able to change your data, but can re-join at any time. After this period, all your data will be hard deleted from kippy.
- You may request a full dump of your data and audit history at any time. Data will be provided via RESTFUL JSON endpoints or via an encrypted zip of JSON files, made available for secure download.
- KPI Cloud is built with multi-tenancy from the ground up, so your data is segregated at all tiers, ensuring only you can see your data.
- Access to data is further restricted by role-based access controls within your organisation and teams - ensuring users can not unintentionally see each other's data.
- End-of-contract data extraction - All the users data is available to the user via the web APIs at any time. All kippy data is regularly backed up. However, users are also encouraged to take extracts of their data for backups or local integrations as often as they choose.
- Kippy is fully functional on all modern browsers. Google Chrome is the recommended browser. No application to install. Designed for use on mobile devices.
- The service interface is part of the application but only available to users with the appropriate role. The interface allows the user to self-serve any maintenance activities - including adding, renaming, deleting, moving all data objects. All activities are fully audited and follow governance rules to ensure system integrity. The service interface is only available to the appropriate system user, who can a) view the audit log to be viewed b) bulk import existing KPI data c) delete users from the system.



- Kippy is designed to ensure there is practically no usage based impact across users because:
  - - most complex processing is done in the client's browser and not on the kippy servers.
  - - hosting provides rate limiting and DDOS protection
  - - sophisticated caching refreshes in low-priority background jobs
  - - sophisticated auto scaling-up of underlying hosting resource to over 1000 times typical load (which auto scales-down to reduce cost)
- Staff security clearance - Conforms to UK standard BS7858:2012 and Developed Vetting (DV) and OWASP
- Default Data storage and processing locations. United Kingdom. Other hosting options available.
- Data Centre security standards - CSA CCM version 3.0
- Penetration testing frequency - At least once a year. Additional Pen Testing available upon requests.
- Protecting data at rest - Physical access control, complying with CSA CCM v3.0. Physical access control, complying with SSAE-16 / ISAE 3402. Scale, obfuscating techniques, or data storage sharding.
- Data export approach - Users can call kippy's secure web APIs (with the appropriate authentication credentials) to extract all their current and historical data in JSON format. Other data import formats - MS Excel template to collect and bulk upload existing info. Updates can be submitted using RESTFUL/JSON web API calls. No other system ingress or egress channels to data exposed.
- Data protection between buyer and supplier networks and Data protection within supplier network - TLS (version 1.2 or above)
- Approach to resilience - Multi-availability zone replication. Auto-scaling. Automated testing. Canary releases. Production Monitoring
- All configuration is managed with Infrastructure as code (IaC) principles. All code is managed in a private GitHub repository. All changes are reviewed with a formal Architecture design process with formal design documents. All builds and releases are tracked in the CI/CD pipelines. All releases are security and vulnerability scanned.
- Change management processes ensure all releases are a) released outside of business hours b) tested in a Stage production-like environment and c) canary-released before full roll out. API iteration is tracked through semantic versioning.
- Vulnerability management approach Each release is scanned using Google Cloud Web Security Scanner. Security fixes are given highest priority by the in-house development team. Patches can be deployed via the CI/CD pipelines within a minute.



## Extensions

The final key point is that if the needed feature or mechanism is not clearly articulated in the proposed solution, Kippy should not be viewed as a closed and unchangeable platform.

The upfront investment of making kippy a modern cloud-based solution, with the latest modern development practices, means it is incredibly flexible and extensible - allowing quick and easy customisation to your exact needs.

Whether that be specific workflows, complex business rules, new features or deep integrations. The intention is to use the project discovery phase to identify those exact needs and configure and customize to the exact detailed end user requirements.

Contact us at [info@kippy.cloud](mailto:info@kippy.cloud) to learn more