



kippy

Feature Overview

1 Mar 2025

version 1.19



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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.

The screenshot displays the Kippy dashboard interface. At the top, there's a navigation bar with 'KPIs', 'Projects', and 'CEO' dropdowns, followed by 'The Solution Crowd' and date selectors for 'Jan' and '2022'. The main content area is titled 'Strategy' and is divided into three columns: 'Vision', 'Mission', and 'Values'. The 'Vision' section contains the text: 'Honoring our past by creating a future characterized by stimulated growth, development and the incessant practice of excellence in everything we do...'. The 'Mission' section contains: '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 ...'. The 'Values' section contains: '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'. Below these sections is the 'Objectives' section, which is a table with columns for 'Perspective', 'Objective', and 'Description'. The table has four rows: 1. Perspective: Customers, Objective: Increase customer base & products and, Description: (empty). 2. Perspective: Customers, Objective: Provide quality & innovative customer, Description: (empty). 3. Perspective: Finance, Objective: Maximize revenues & returns from core and, Description: (empty). 4. Perspective: Finance, Objective: Optimize capital & operating expenditure, Description: (empty). A video player overlay titled 'Getting started' is positioned in the center-right, showing the text 'System owner guide'. The video player has a progress bar at 16:14. At the bottom of the dashboard, there's a status bar with 'Last actual provided by neuman.khan@thesolutioncrowd.com on Wed, Jan 12, 2022 3:25 PM', a 'Need help?' button, and a legend with color-coded boxes for '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.



Overview

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

KIPs

Projects

CEO

The Solution Crowd

Dec / Q4 / H2 / Year

2024

3

54

1

1

1

Home

Overview

Teams

Strategy

Maintain

Scorecard

Check in

Summary

Details

Analyze

Collaborate

Manage

Reports

Tools

Help

Check ins (1)

1 check ins due from last month

1 day until lock

| Team | KPI |
|------|-----------------------|
| CEO | Supplier Cost Savings |

Inbox (36)

| 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%)

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

| Objective | Score |
|-------------|-------|
| Cost saving | |

My overview

| 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 |
| Appraisor | Nauman Khan |

Tasks (17)

| 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

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

Last update by Owen Turner 48 minutes ago. Locks on day 8.

Need help?

Legend

>=100%

70-99%

<70%

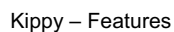
Target

Missing

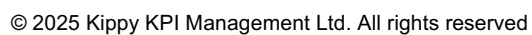
Not due

Managers

Users



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



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.

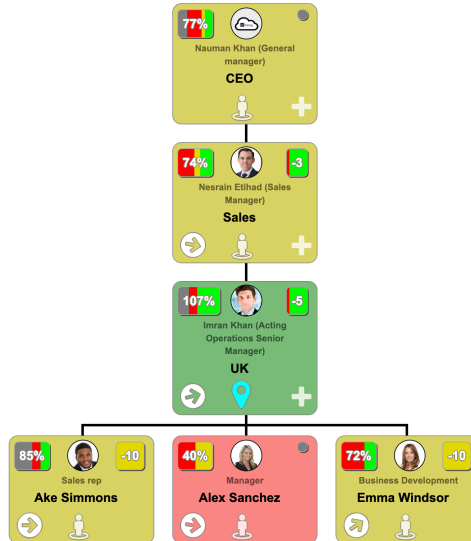
Double-click on the team boxes in the structure to collapse/expand each portion of the tree. Hold shift and scroll your mouse wheel for slow zoom in and out.

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.



Navigation bar with tabs: KPIs, Projects, UK (selected), The Solution Crowd, Feb, 2024, and user profile. Below the tabs are links: Home, Analyze, Collaborate, Reports, Tools, Help. On the right, there are status indicators: 97 unapproved KPIs, 2 self-appraisals to review, and a checkmark icon.

Teams



Add teams and people directly to the hierarchy.

The screenshot shows the Kippy interface with a modal titled "Add a new team" open. The modal has a section "Add to Sales" with a "Team name" input field containing "South America". There are "CLOSE" and "ADD TEAM" buttons. The background shows a hierarchical view of teams and individuals. The left sidebar has icons for Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, and Analyze. The right sidebar has icons for Strategy, Maintain, Scorecard, Unblock, Colour, and a user profile. The bottom status bar shows "Current as of Friday, October 15, 2021 4:11 PM" and a "Leave a message" button. A legend at the bottom right shows color-coded KPI ranges: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

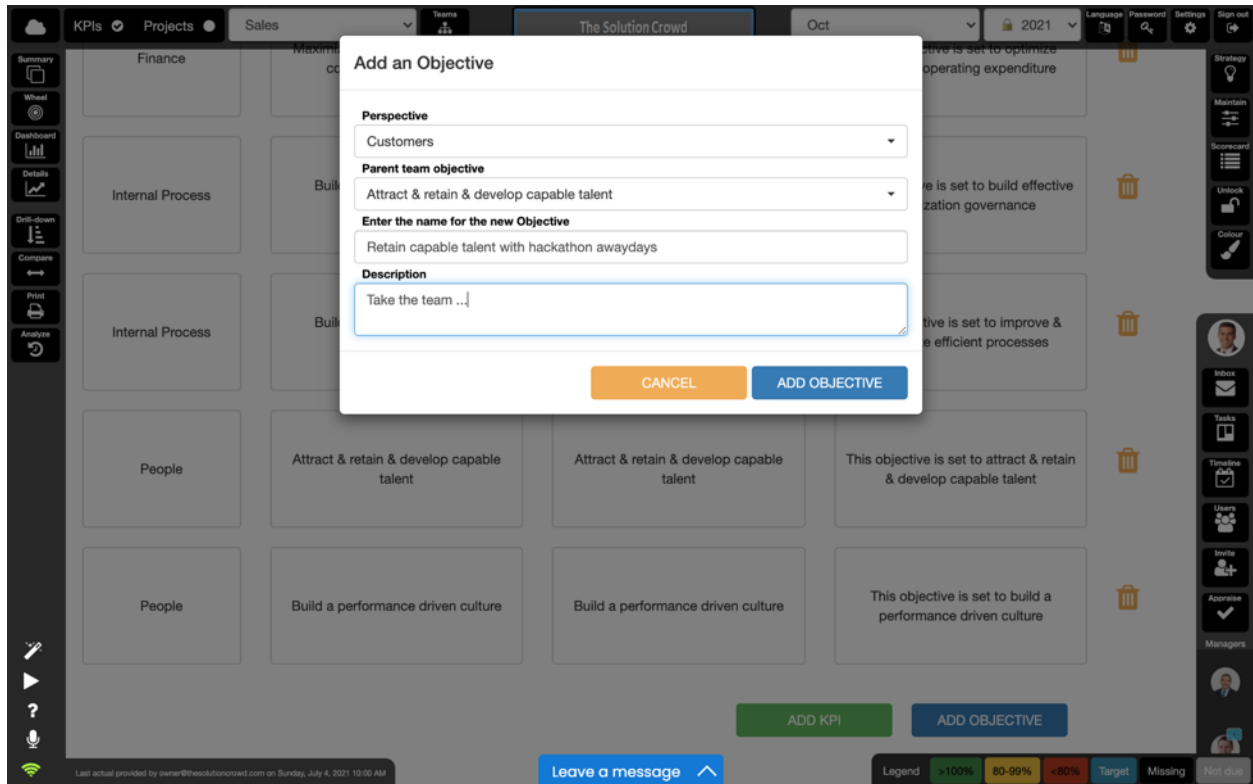


Kippy – Features

The screenshot displays the Kippy dashboard interface. At the top, there's a navigation bar with tabs for KPIs, Projects, Sales, and Teams. The 'Teams' tab is active, showing a hierarchy for 'The Solution Crowd'. A modal window titled 'Add a new team member' is open, with a sub-header 'Add to UK'. It contains two input fields: 'User's name' with the value 'Bob Jones' and 'User's email' with the value 'bob.jones@thesolutioncrowd.com'. Below the inputs are 'CLOSE' and 'ADD USER' buttons. The background shows a team structure with nodes for Business Support (107%), Operations (108%), Human Resources (102%), UK (81%), and MENA (92%). The UK node has three sub-nodes: Emma Windsor (225%), Ake Simmons (60%), and Alex Sanchez (0%). The MENA node has one sub-node. A legend at the bottom right indicates color coding for performance: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (light grey). The bottom status bar shows 'Current as of Friday, October 15, 2021 3:05 PM' and a 'Leave a message' button.

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 🔗 | Percentage of employees who report feeling engaged and committed to their work 🔗 | % 🔗 | Increase is better 🔗 | Add |
| Suggested | Unapproved | Time to Fill Positions 🔗 | Average time it takes to fill open positions 🔗 | days 🔗 | Decrease is better 🔗 | Add |
| Suggested | Unapproved | Internal Promotion Rate 🔗 | Percentage of employees who are promoted from within the organization 🔗 | % 🔗 | Increase is better 🔗 | Add |
| Suggested | Unapproved | Training Effectiveness 🔗 | Percentage of employees who report that training programs have improved their skills and performance 🔗 | % 🔗 | Increase is better 🔗 | Add |
| Suggested | Unapproved | Diversity Index 🔗 | Percentage of employees from diverse backgrounds, including gender, race, and ethnicity 🔗 | % 🔗 | Increase is better 🔗 | Add |
| Suggested | Unapproved | Employee Net Promoter Score (eNPS) 🔗 | Percentage of employees who are willing to recommend the organization as a great place to work 🔗 | % 🔗 | Increase is better 🔗 | Add |
| Suggested | Unapproved | Leadership Effectiveness 🔗 | Percentage of employees who rate their immediate supervisor as effective in their role 🔗 | % 🔗 | Increase is better 🔗 | Add |
| Suggested | Unapproved | Career Development Score 🔗 | Percentage of employees who report feeling that the organization supports their career development 🔗 | % 🔗 | Increase is better 🔗 | Add |
| <div><div>Hints</div><div>e.g. These KPIs are for a Sales team in the manufacturing industry. The currency is dollars. Make the descriptions longer. etc.</div><div>Suggest Back</div></div> <div><div>Help</div><div>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.</div></div> | | | | | | |

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.



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

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...



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 |

SAVE

CANCEL

ADD ROW

SUGGEST

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 in the Kippy application. The top navigation bar includes 'KPIs', 'Projects', a user dropdown for 'Emma Windsor', a search bar, a date selector for 'Oct', and a year selector for '2021'. The left sidebar contains icons for Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, and Analyze. The right sidebar contains icons for Strategy, Maintain, Scorecard, Unlock, and a user profile section with links to Inbox, Tasks, Timeline, Users, Invite, Approve, and Managers.

The main content area is titled 'Maintain' and displays the configuration for a KPI. The breadcrumb trail is 'Perspective | Objective | KPI'. The selected path 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
- Description:** (empty text area)
- Formula:** (empty text area)
- Data Source:** (empty text area)

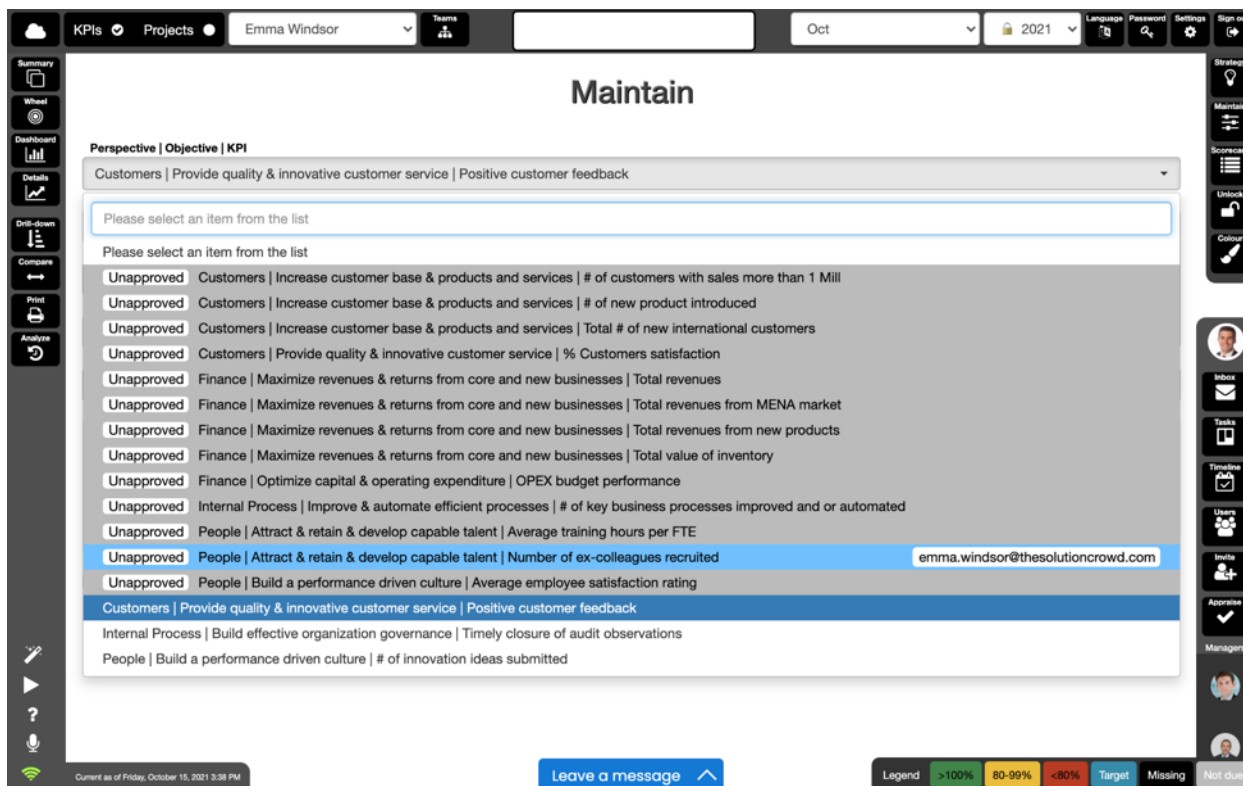
Below the configuration fields is a table titled 'Targets and actuals for 2021' showing data for each month from January to December.

| 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 | | |

At the bottom left, there is a 'KPI approval status' section with a checkbox for 'Approved'. At the bottom right, there are two buttons: 'CREATE NEW KPI' (green) and 'EDIT KPI' (blue). A legend at the bottom right shows color-coded boxes for performance levels: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

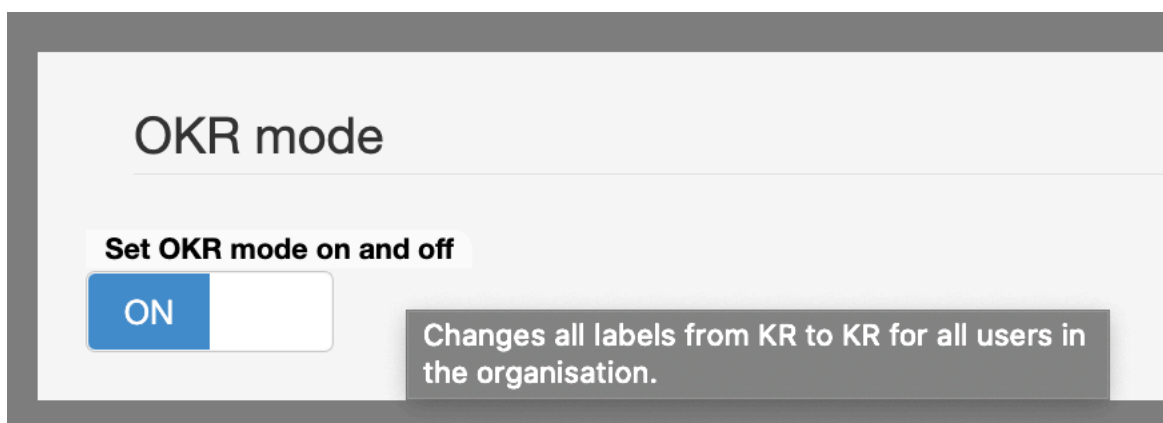
OKRs

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



The screenshot shows the 'Maintain' interface in Kippy. The top navigation bar includes 'KPIs', 'Projects', a user dropdown for 'Emma Windsor', a date selector for 'Oct 2021', and various settings icons. The left sidebar contains navigation options like 'Summary', 'Wheel', 'Dashboard', 'Details', 'Drill-down', 'Compare', 'Print', and 'Analyse'. The main content area is titled 'Maintain' and shows a breadcrumb trail: 'Perspective | Objective | KPI'. Below this, there's a search bar and a list of KPIs. The selected KPI is 'Unapproved People | Attract & retain & develop capable talent | Number of ex-colleagues recruited' with the email 'emma.windsor@thesolutioncrowd.com' next to it. The bottom of the interface shows a status bar with 'Current as of Friday, October 15, 2021 3:38 PM', a 'Leave a message' button, and a legend for performance levels: '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.

Full OKR mode



The screenshot shows the 'OKR mode' toggle interface. It features a large heading 'OKR mode' and a section titled 'Set OKR mode on and off'. Below this, there is a toggle switch with 'ON' selected. A callout box states: 'Changes all labels from KR to KR for all users in the organisation.'

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).

KPIs

Projects

Emma Windsor

Teams

Oct

2021

Language

Password

Settings

Sign out

Summary

Wheel

Dashboard

Details

Drill-down

Compare

Print

Analyze

Strategy

Maintain

Scorecard

Unlock

Colour

Inbox

Tasks

Timeline

Users

Invite

Approve

Managers

Maintain

Objective

Improve & automate efficient processes

KPI Name

Number of passed builds

Owner

emma.windsor@thesolutioncrowd.c

Direction

Increase is better

Weight

1x

Unit

Frequency

Quarterly

Cumulative

Yes

Description

Formula

Data Source

Targets and actuals for 2021

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

KPI approval status

☐ Approved

CANCEL

SAVE NEW KPI

Leave a message

Legend

>100%

80-99%

<80%

Target

Missing

Not due

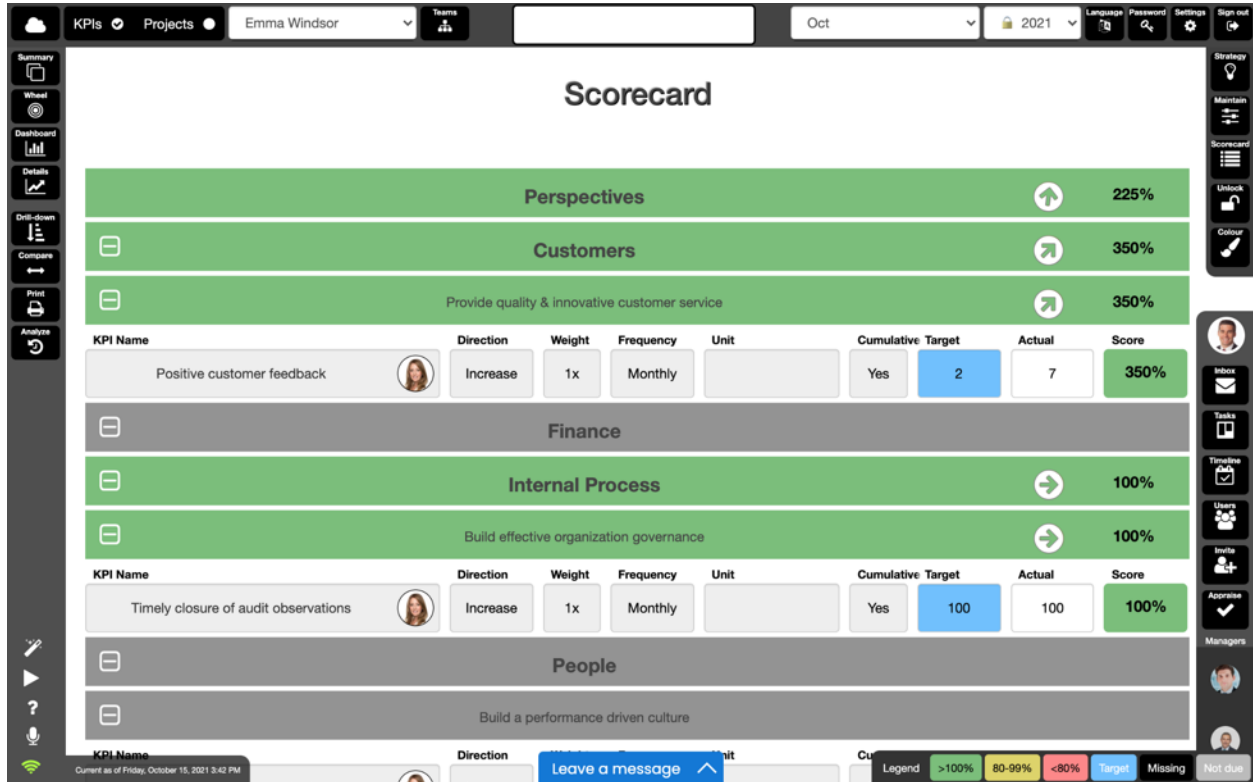
Current as of Friday, October 15, 2021 3:38 PM

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. At the top, there's a navigation bar with tabs for KPIs, Projects, and a user profile (Emma Windsor). Below this, the main area is titled 'Scorecard' and shows a list of KPIs categorized by Perspectives, Customers, Finance, Internal Process, and People. Each KPI has a table with columns for KPI Name, Direction, Weight, Frequency, Unit, Cumulative Target, Actual, and Score. The 'Actual' column is highlighted in blue, indicating the current progress. A legend at the bottom right shows color-coded status indicators: green for >100%, yellow for 80-99%, red for <80%, blue for Target, grey for Missing, and white for Not due.

| Perspectives | Score |
|---|-------|
| Customers | 350% |
| Provide quality & innovative customer service | 350% |

| KPI Name | Direction | Weight | Frequency | Unit | Cumulative Target | Actual | Score | |
|----------------------------|-----------|--------|-----------|------|-------------------|--------|-------|------|
| Positive customer feedback | Increase | 1x | Monthly | | Yes | 2 | 7 | 350% |

| Finance | Score |
|---|-------|
| Internal Process | 100% |
| Build effective organization governance | 100% |

| KPI Name | Direction | Weight | Frequency | Unit | Cumulative Target | Actual | Score | |
|--------------------------------------|-----------|--------|-----------|------|-------------------|--------|-------|------|
| Timely closure of audit observations | Increase | 1x | Monthly | | Yes | 100 | 100 | 100% |

| People | Score |
|------------------------------------|-------|
| Build a performance driven culture | |

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

Check in

Please sign in

emma.windsor@thesolutioncrowd.com

.....

Sign in

© 2021



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 | Cumulative

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.

 Sign out

KPI details

Jun 2022

Hold town hall event (100%)

Completed **Yes**

STM

Process

Strengthen Cross Functional Working

Increase is better | 1x | Monthly | Cumulative
last updated 25 second ago

Submit new actual


☐ Not Completed

☒ Completed

Save

Cancel

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

 Sign out

KPI details

Jun 2022

Hold town hall event (100%)

OKR **1**

STM

Process

Strengthen Cross Functional Working

Increase is better | 1x | Monthly | Cumulative
last updated 9 second ago

Submit new actual

0.0

0.1

0.2

0.3

0.4

0.5

0.6

0.7

0.8

0.9

1.0

We failed to make real progress

We made progress, but fell short of completion

We delivered

1

Save

Cancel



Customer Churn Rate (100%)

RAG 10

CEO

Customers

Increase Customer Retention

Decrease is better | 1x | Monthly | Cumulative

$$\frac{\text{Number of customers lost during period}}{\text{Total number of customers at start of period}} * 100$$

last updated 3 minutes ago

Measures the percentage of customers lost over a specific period.

Submit new actual

☐ Red

☐ Amber

☒ Green

Save

Cancel

Customer Retention Rate (100%)

Achieved Yes

CEO

Customers

Increase Customer Retention

Increase is better | 1x | Monthly | Cumulative

$$\frac{(\text{Number of customers at end of period} - \text{Number of new customers during period})}{\text{Number of customers at start of period}} * 100$$

last updated 14 minutes ago

Tracks the percentage of customers retained over a specific period.

Submit new actual

☐ No

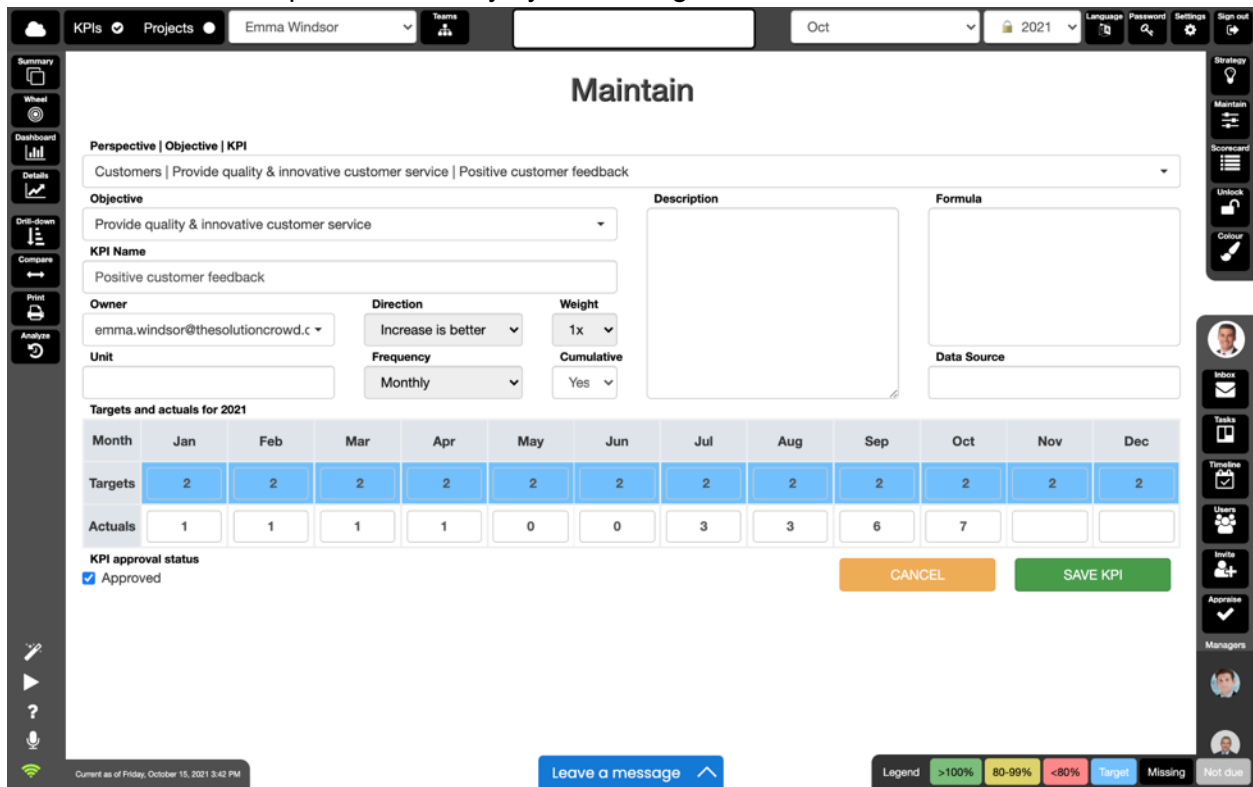
☒ Yes

Save

Cancel

Maintain UI

- Actual can be provided directly by the manager



Maintain

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:

Frequency: Monthly

Cumulative: Yes

Description:

Formula:

Data Source:

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

CANCEL SAVE KPI

Leave a message

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



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=<p
eriod>&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 |
|--|---|
| <code>=cloud.kippy.score.top()</code> | Restrict score to maximum of 100 |
| <code>=cloud.kippy.score.top(110)</code> | Restrict score to a maximum value e.g. 110 |
| <code>=cloud.kippy.score.bottom()</code> | Restrict score to minimum of 0 |
| <code>=cloud.kippy.score.bottom (10)</code> | Restrict score to a minimum value e.g. 10 |
| <code>=cloud.kippy.score.range (20, 80)</code> | Restrict score to be within the range specified |
| <code>=cloud.kippy.score.positive()</code> | Absolute value e.g. -5 will be 5 |
| <code>=cloud.kippy.score.negative()</code> | Absolute value multiplied by -1 |
| <code>=cloud.kippy.score.mid(20,90)</code> | 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

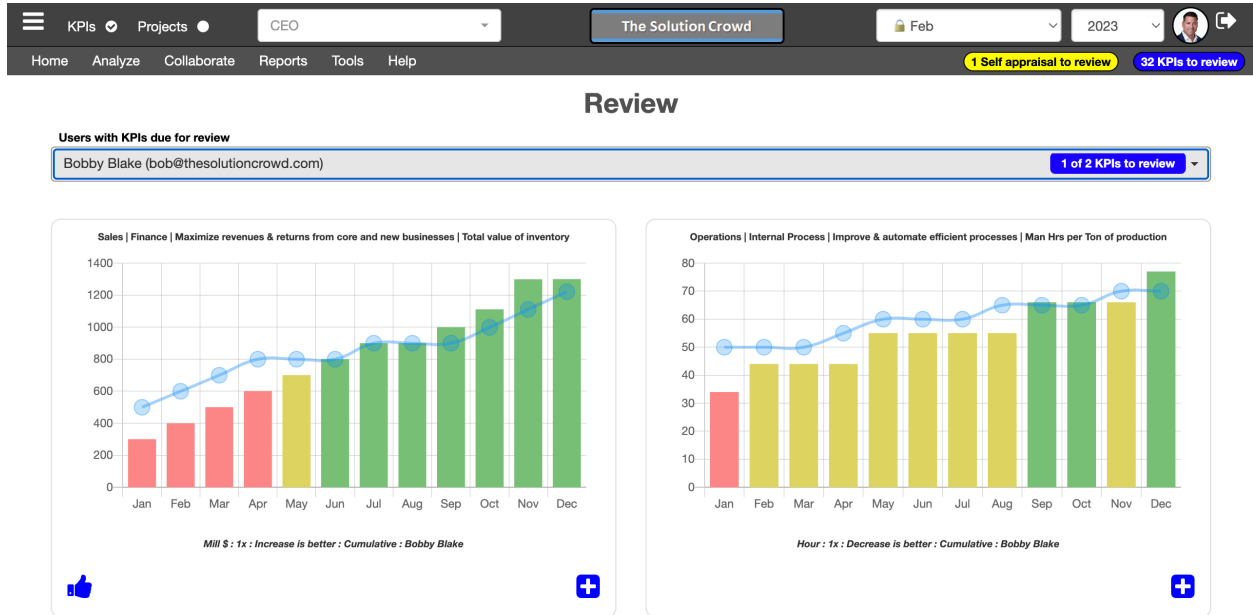
The formula `=cloud.kippy.use("param1")` will use the actual value of the *param1* – where *param1* is either the name of KPI in the current team or the name of a metric variable.



Reviewing actuals

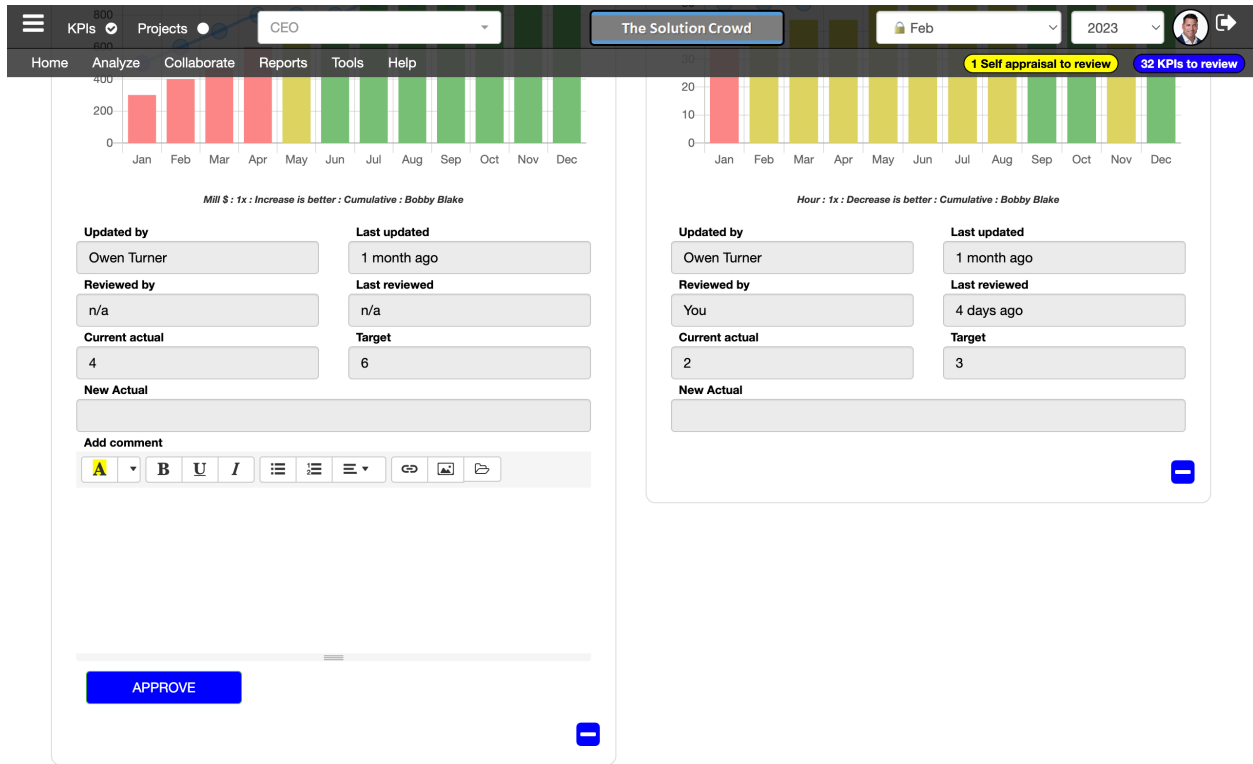
Manager UI

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





Kippy – Features




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

Sign in

© 2021

KippySign out

Individual KPIs

2021 > Oct

| Name | # KPIs | # Pending | Last submission |
|--------------|--------|-----------|-----------------|
| Ake Simmons | 1 | 1 | 08-Oct-2021 |
| Alex Sanchez | 1 | 1 | 08-Oct-2021 |
| Emma Windsor | 4 | 2 | 08-Oct-2021 |

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



Employee KPI Review

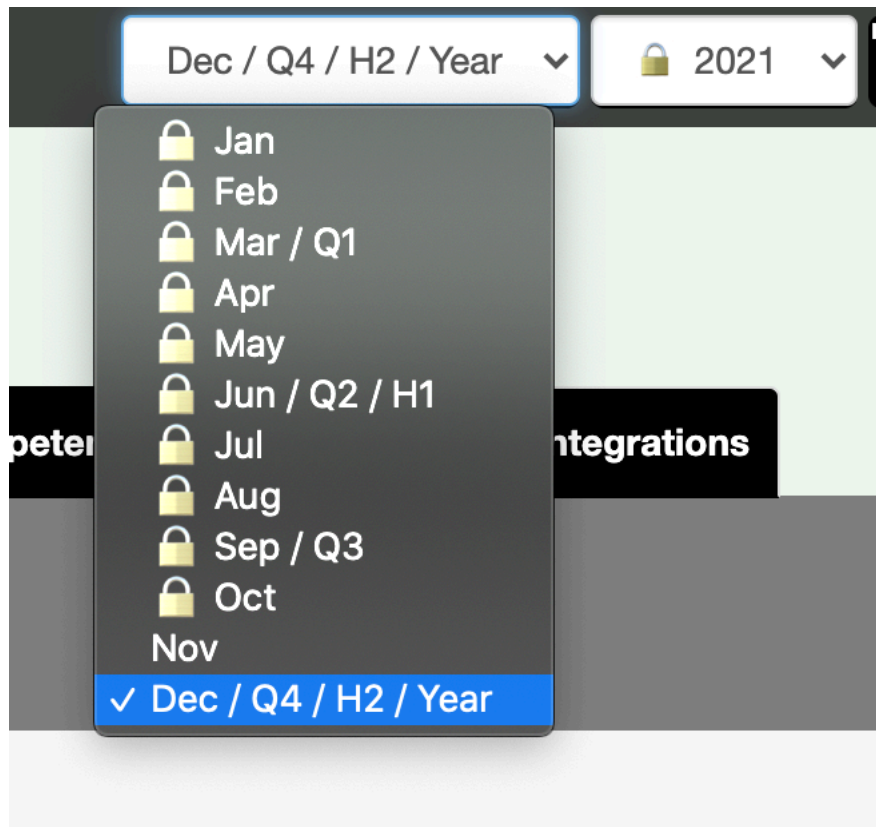
[2021](#) > [Oct](#) > Emma Windsor

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

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

History

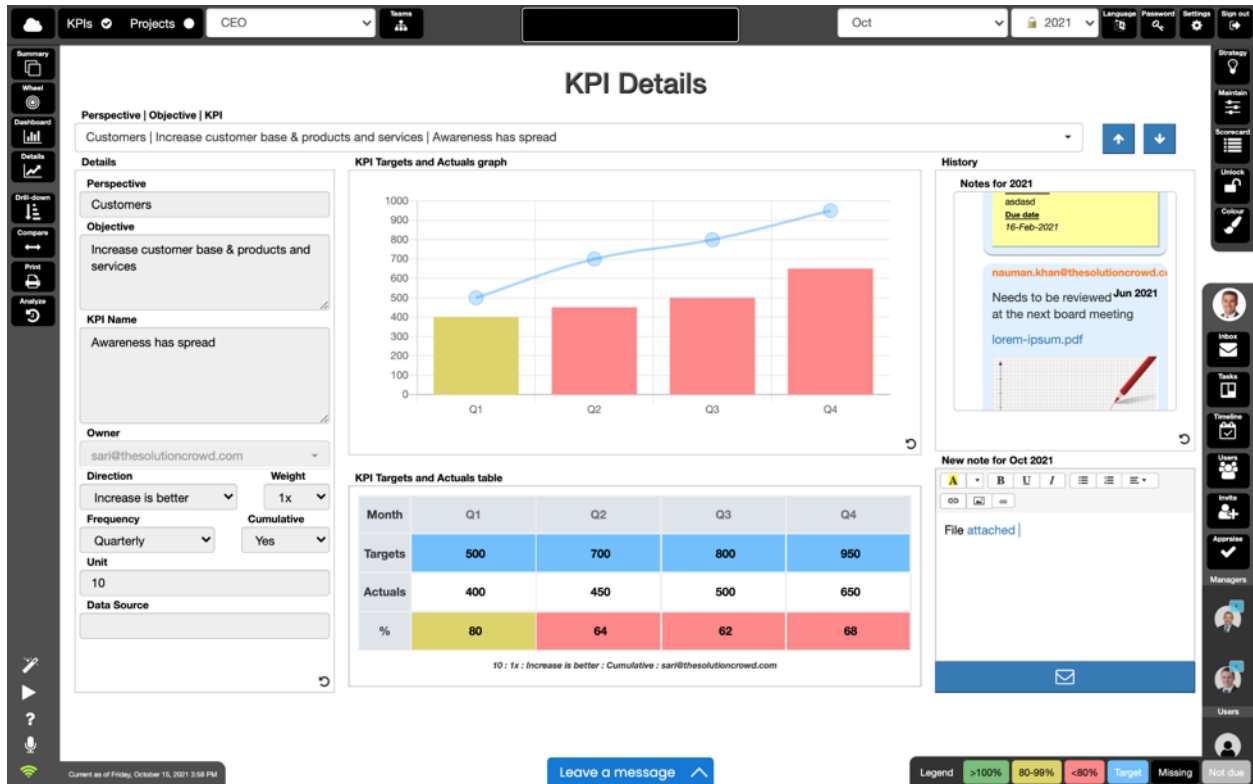
Review historical organisation performance by going back to previous months and years.





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.





Kippy – Features

Insert File

Select from files
[Choose file](#) | No file chosen

File URL

[INSERT FILE](#)

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





[Leave a message](#)

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



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 |
|  |

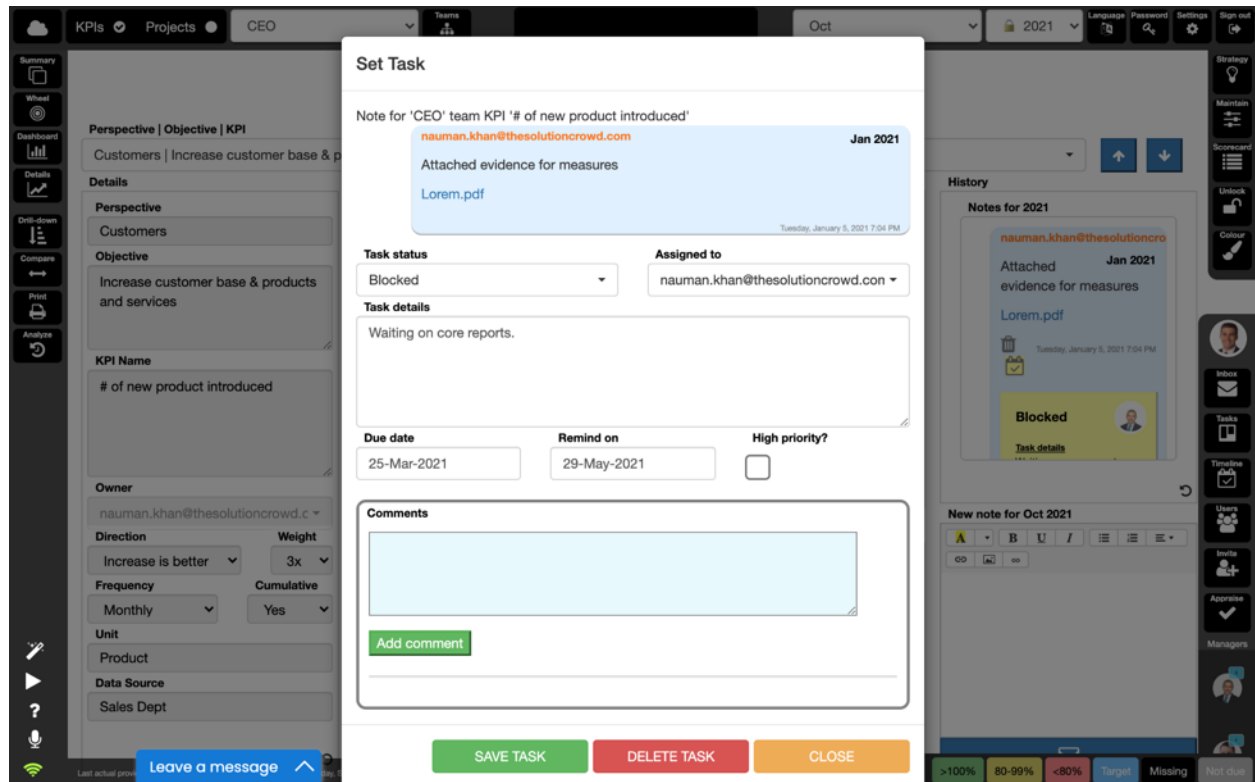
Mentions

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.

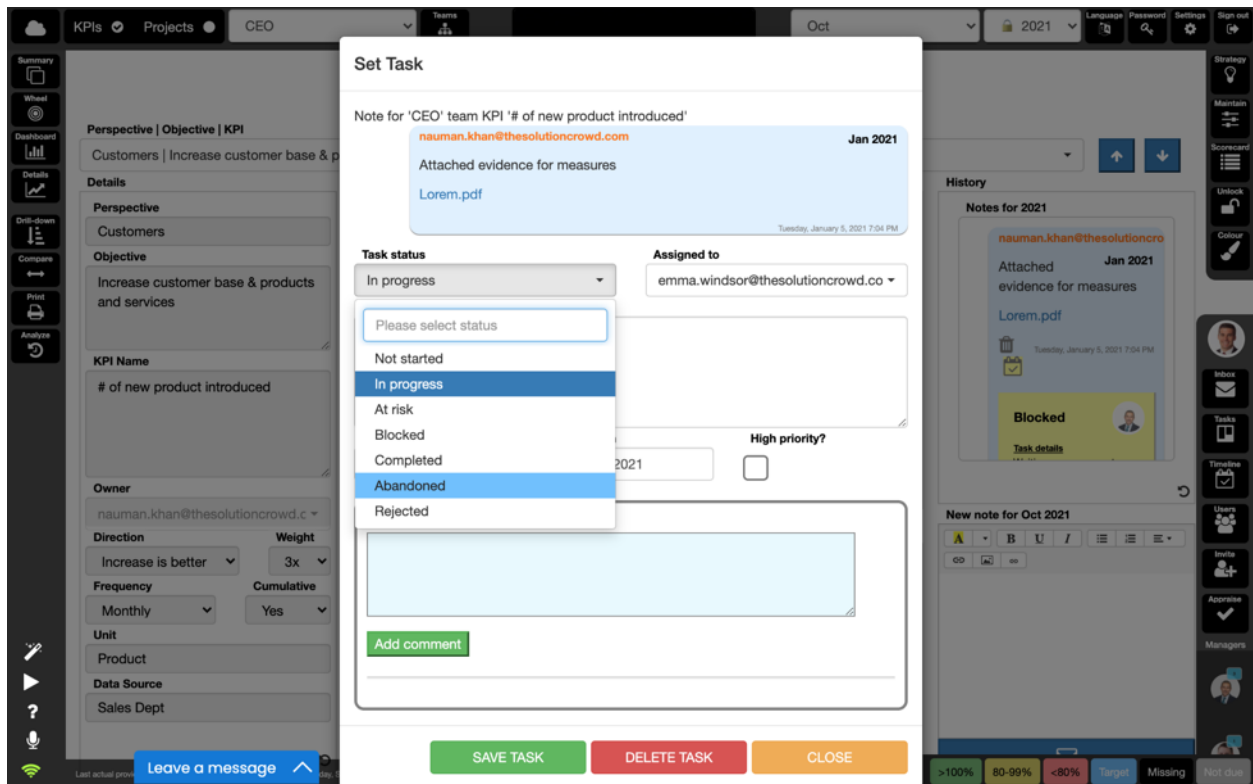


The screenshot shows the 'Set Task' modal form in the Kippy application. The form is overlaid on a dashboard background. The modal contains the following fields and sections:

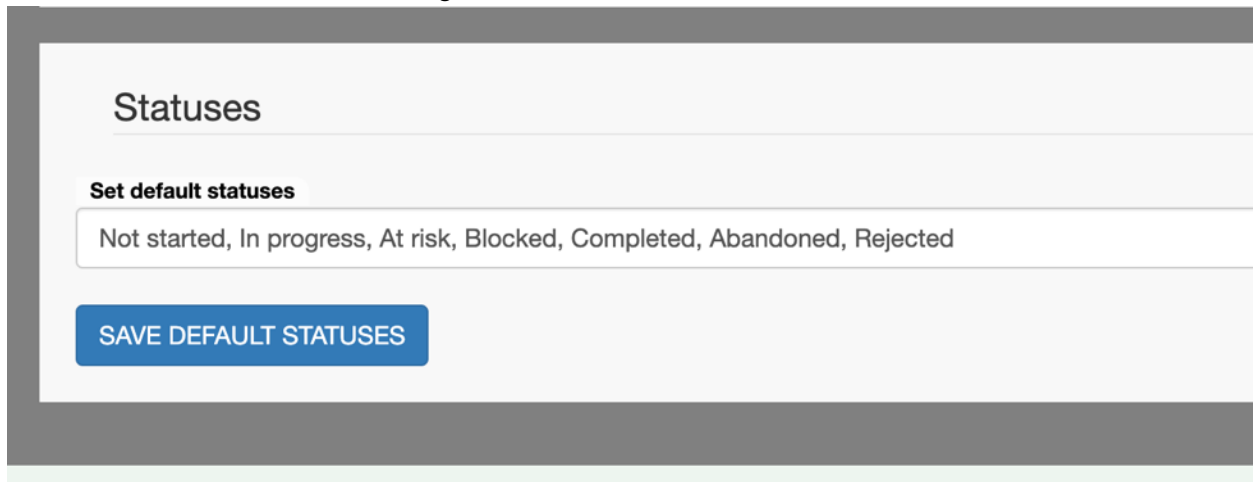
- Note for 'CEO' team KPI '# of new product introduced'**: A text area with a date picker set to 'Jan 2021'. Below it, there is a link 'nauman.khan@thesolutioncrowd.com' and a file attachment 'Attached evidence for measures Lorem.pdf'.
- Task status**: A dropdown menu currently showing 'Blocked'.
- Assigned to**: A dropdown menu showing 'nauman.khan@thesolutioncrowd.com'.
- Task details**: A text area containing 'Waiting on core reports.'
- Due date**: A date picker set to '25-Mar-2021'.
- Remind on**: A date picker set to '29-May-2021'.
- High priority?**: A checkbox that is currently unchecked.
- Comments**: A large text area for additional notes, with an 'Add comment' button below it.

At the bottom of the modal, there are three buttons: 'SAVE TASK' (green), 'DELETE TASK' (red), and 'CLOSE' (orange). The background dashboard shows a sidebar with navigation options like 'Summary', 'Wheel', 'Dashboard', 'Details', 'Drill-down', 'Compare', 'Print', and 'Analyze'. The main content area displays a KPI card for 'Customers | Increase customer base & products and services' with a '# of new product introduced' objective. The right sidebar shows a 'History' section with 'Notes for 2021' and a 'New note for Oct 2021' section.

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



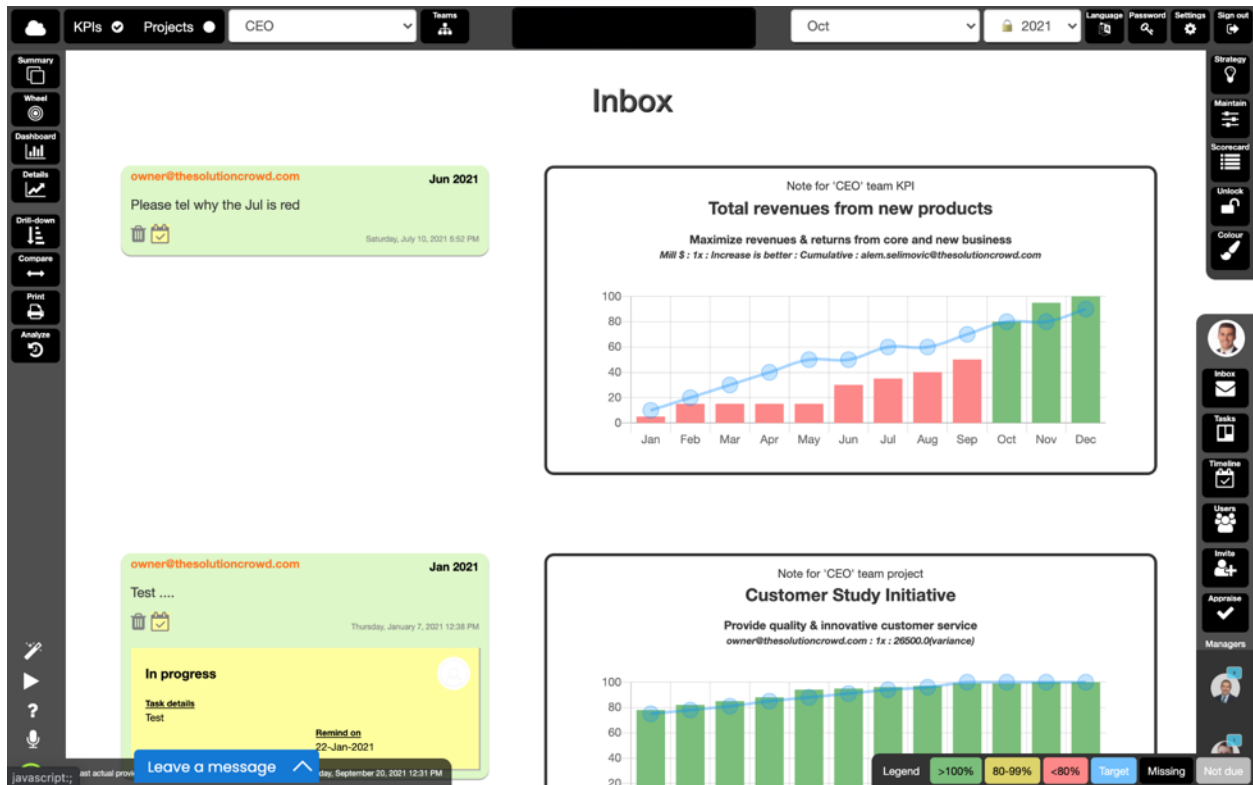
The set of task statuses are configurable.

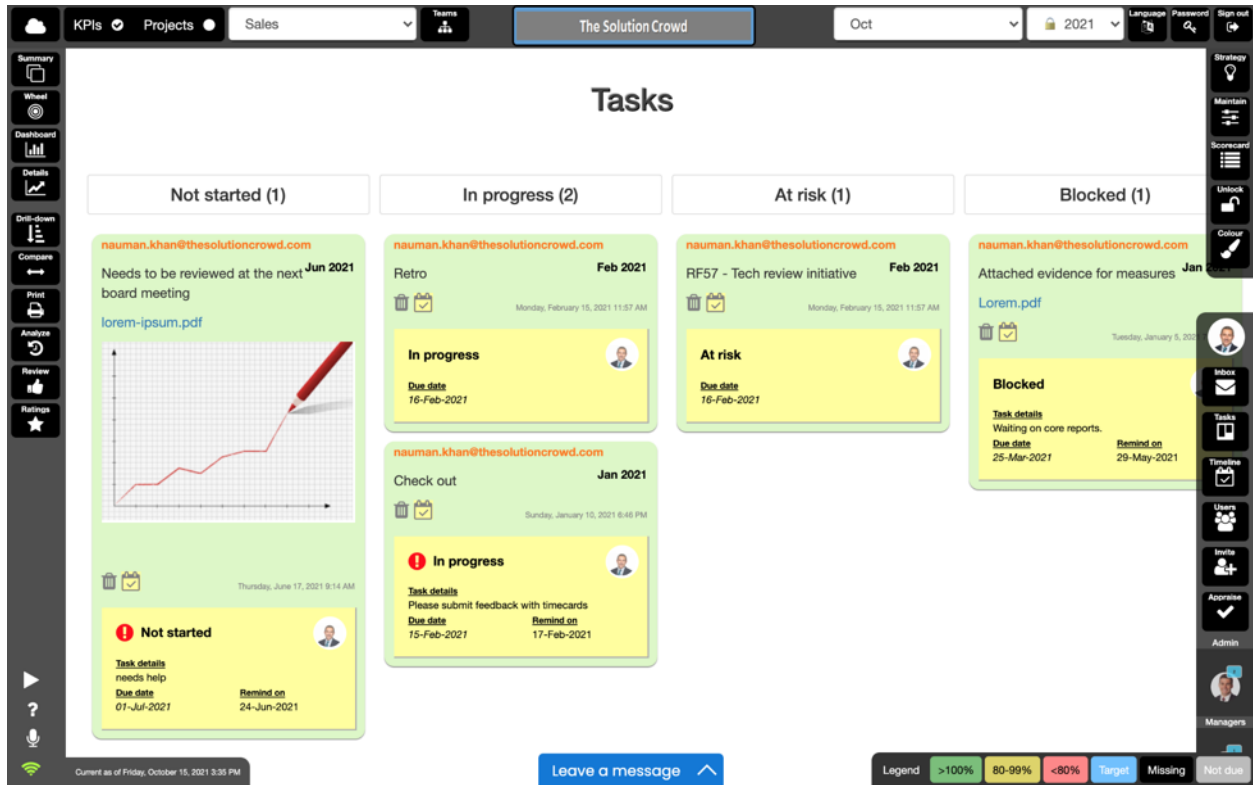




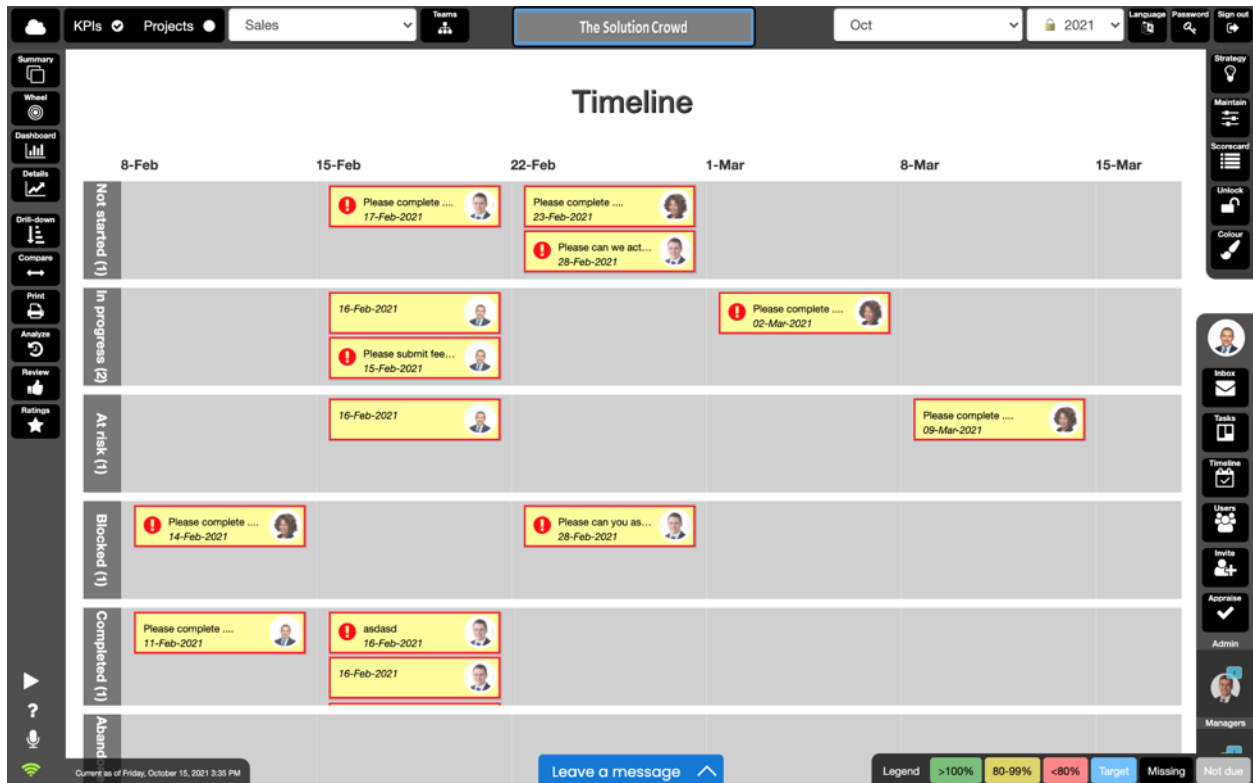
Task viewing

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.



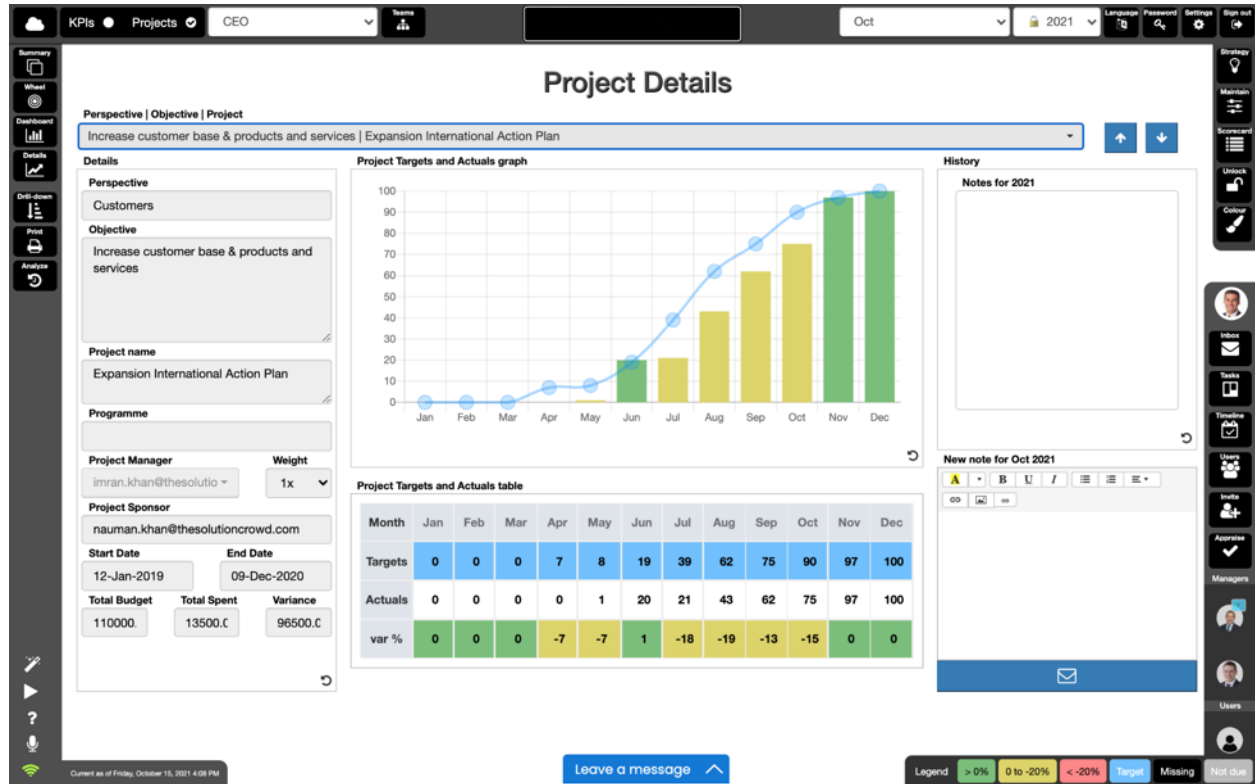


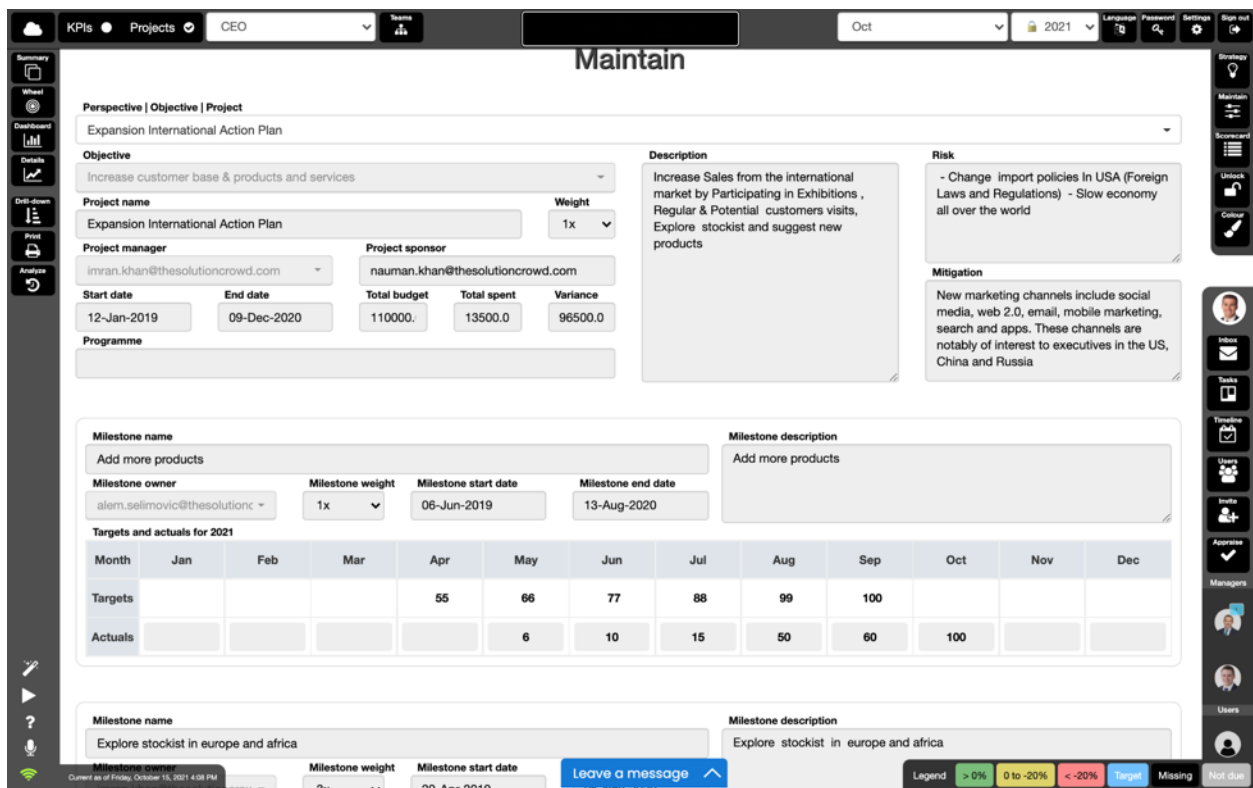
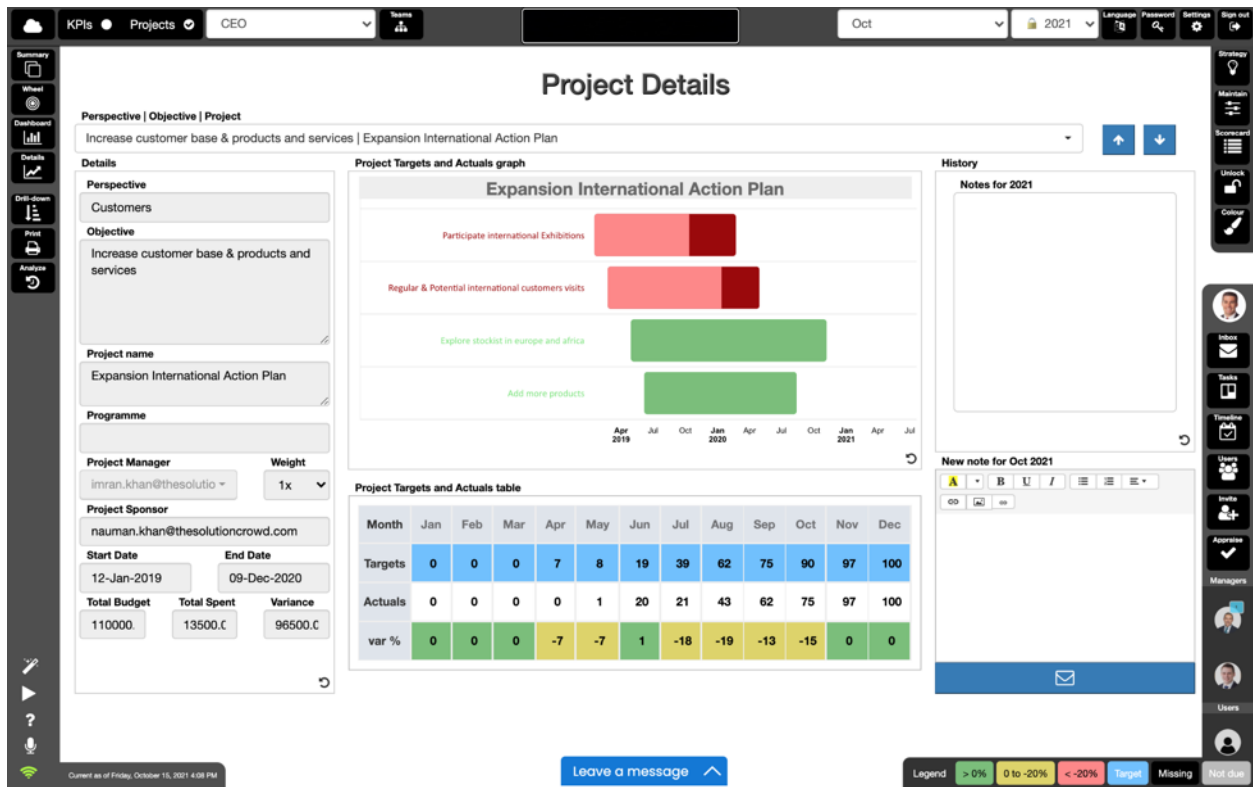
Tasks can be drag and dropped to different statuses in the Tasks screen.

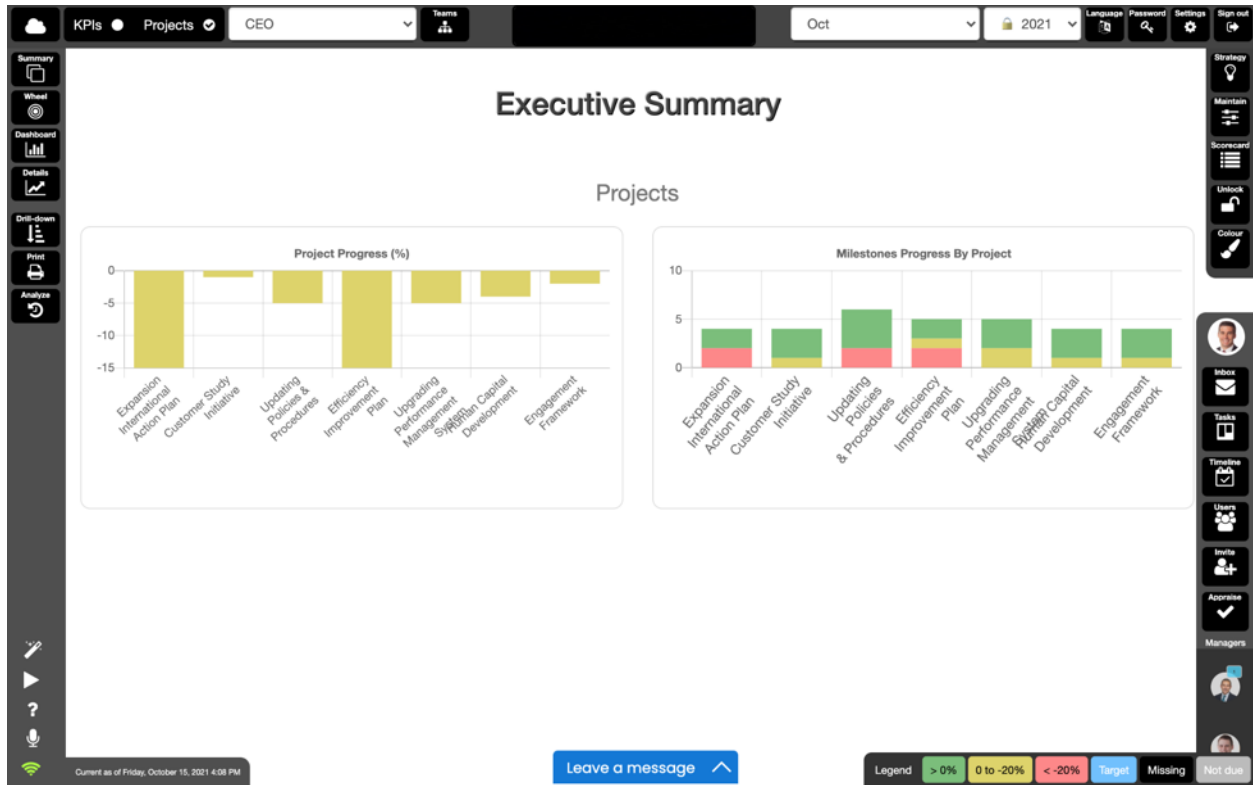


Projects

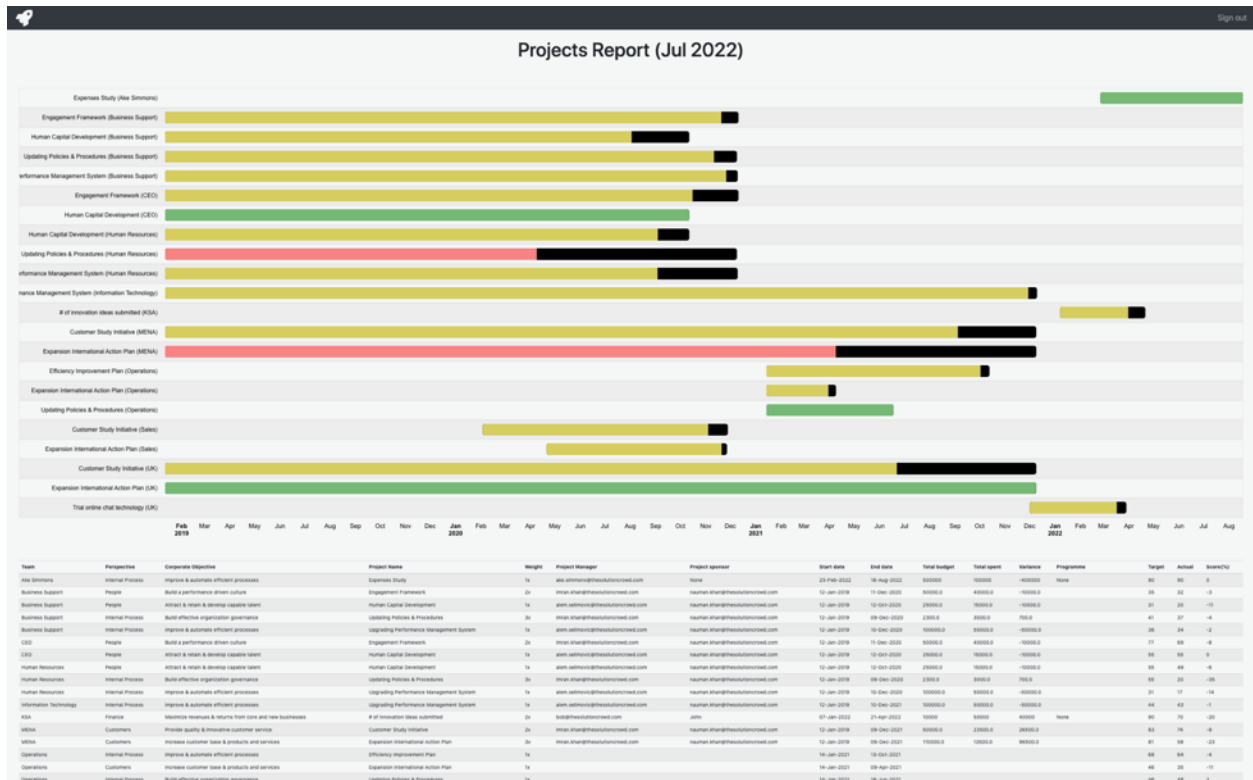
As well as individual and team KPIs, employees can also be made responsible for milestones on key Projects.







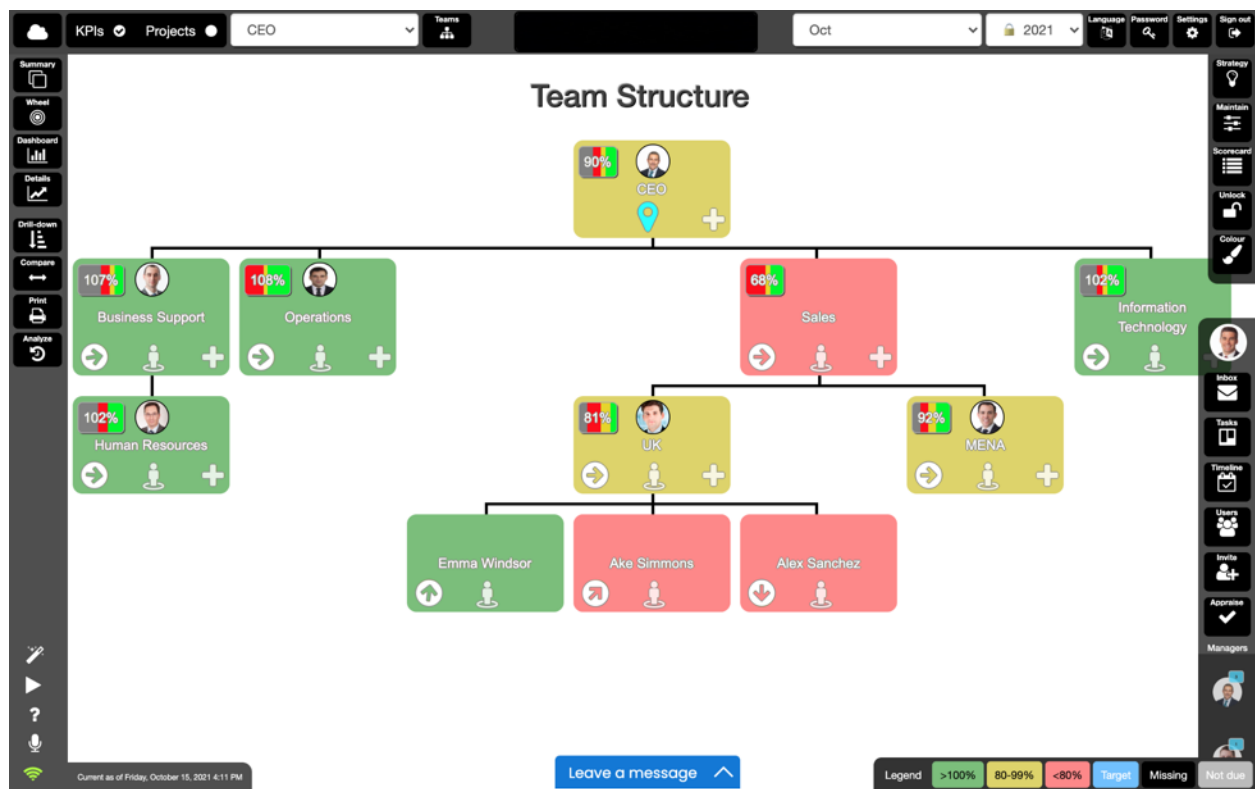
The Projects microapp summarizes all projects and project performance on a Gantt chart.

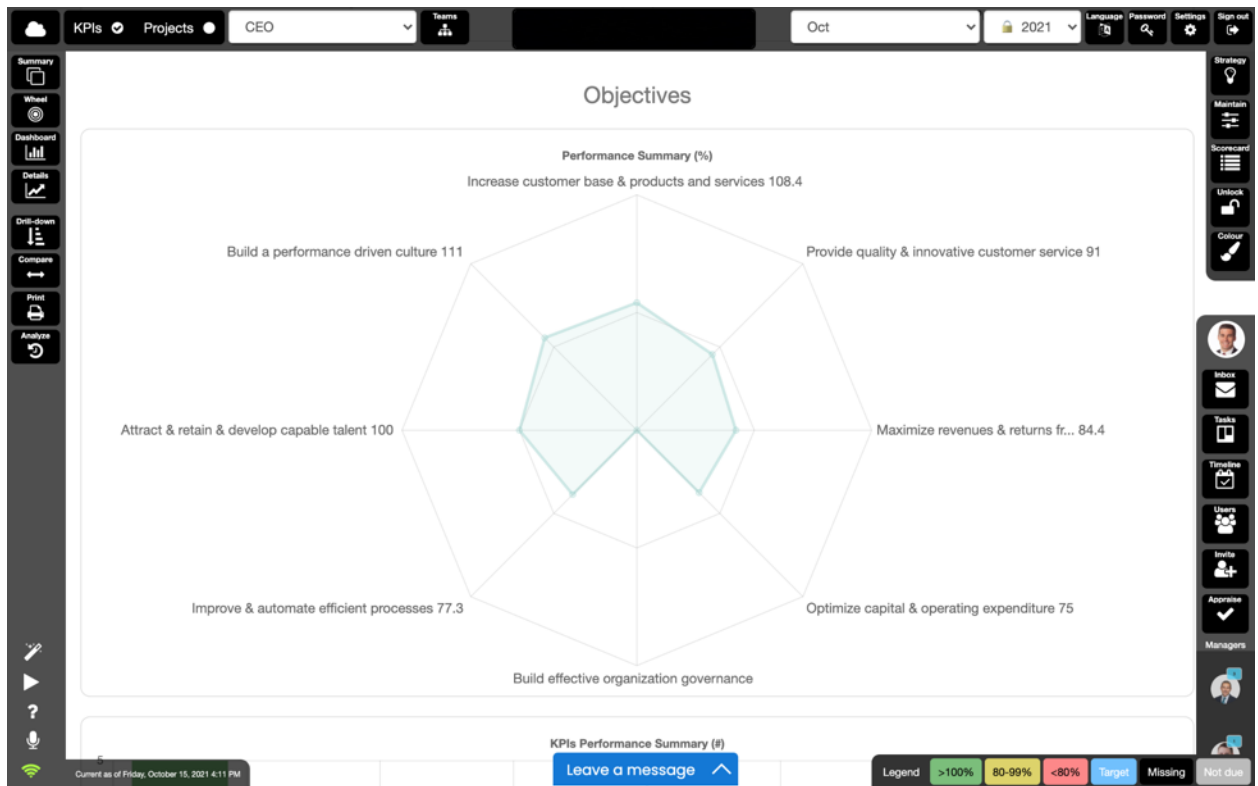
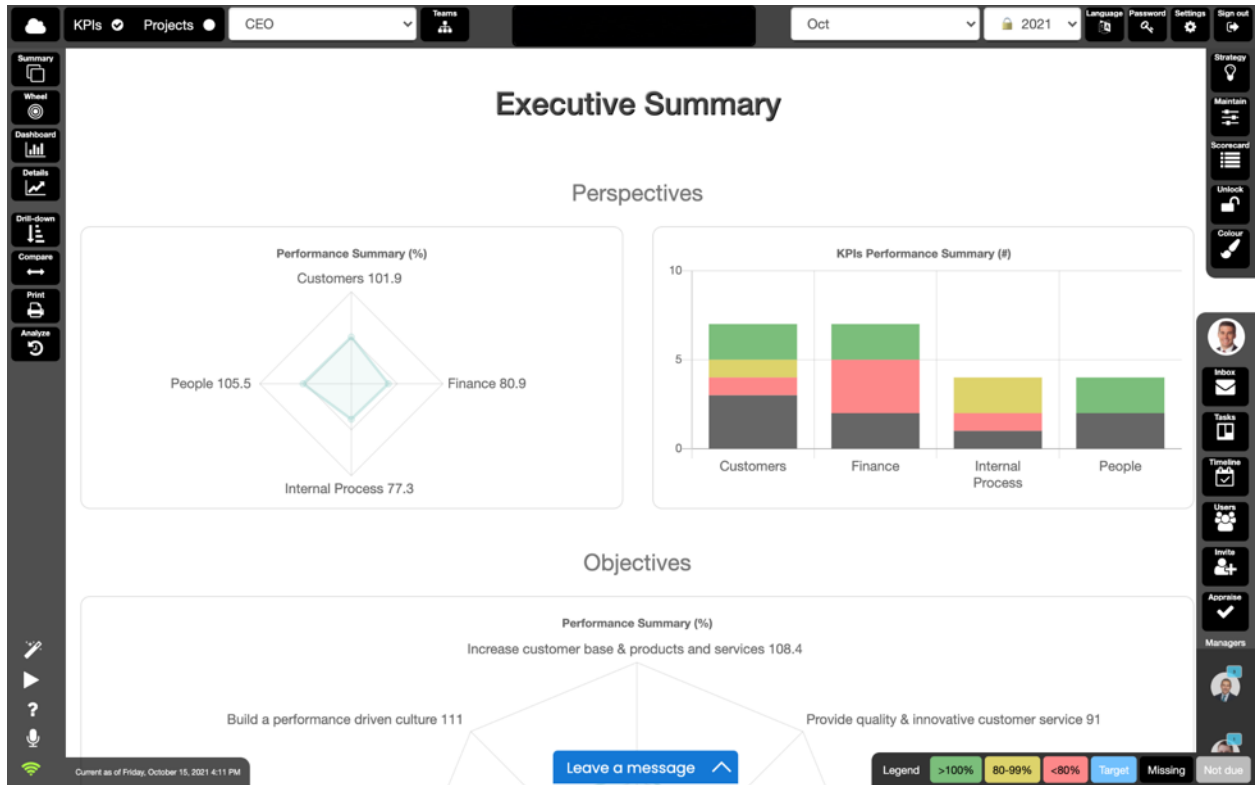


Live dashboards

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

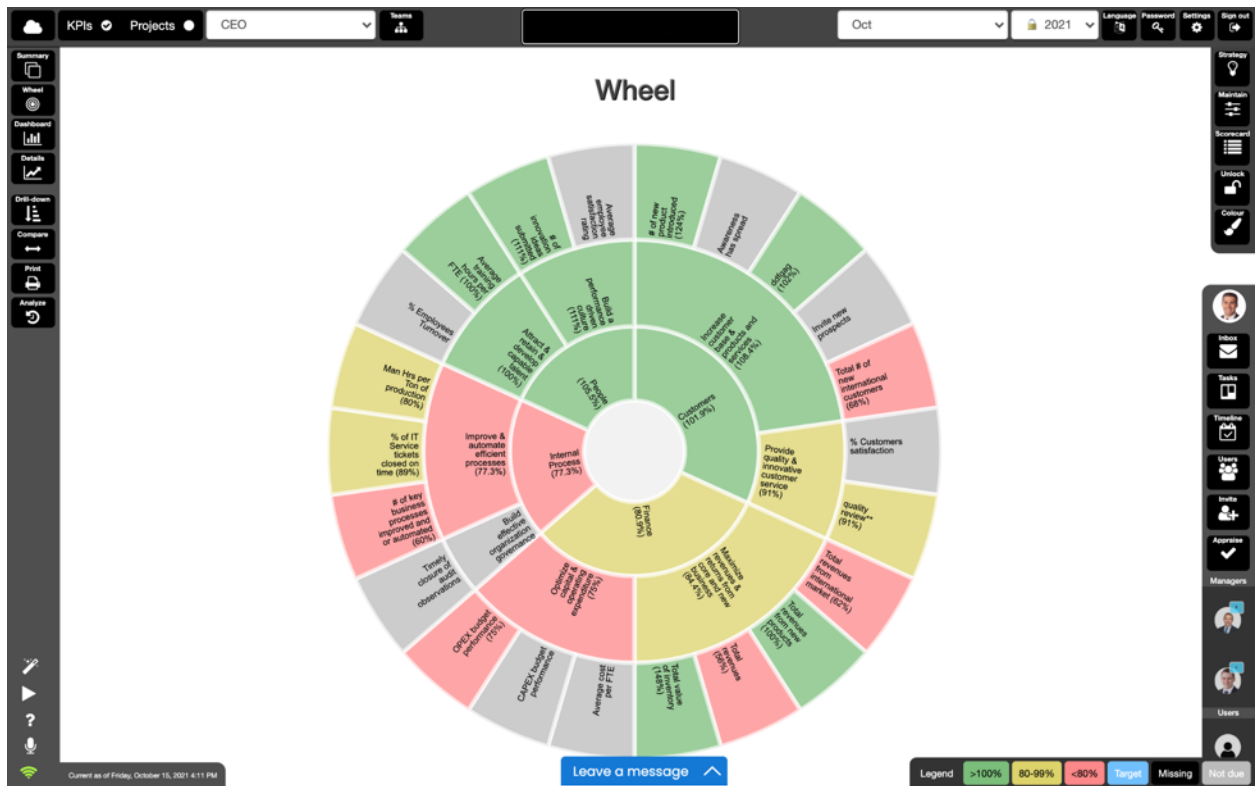
- By corporate performance
- By team
- By shared objective
- By project
- By employee
- And much, much more.

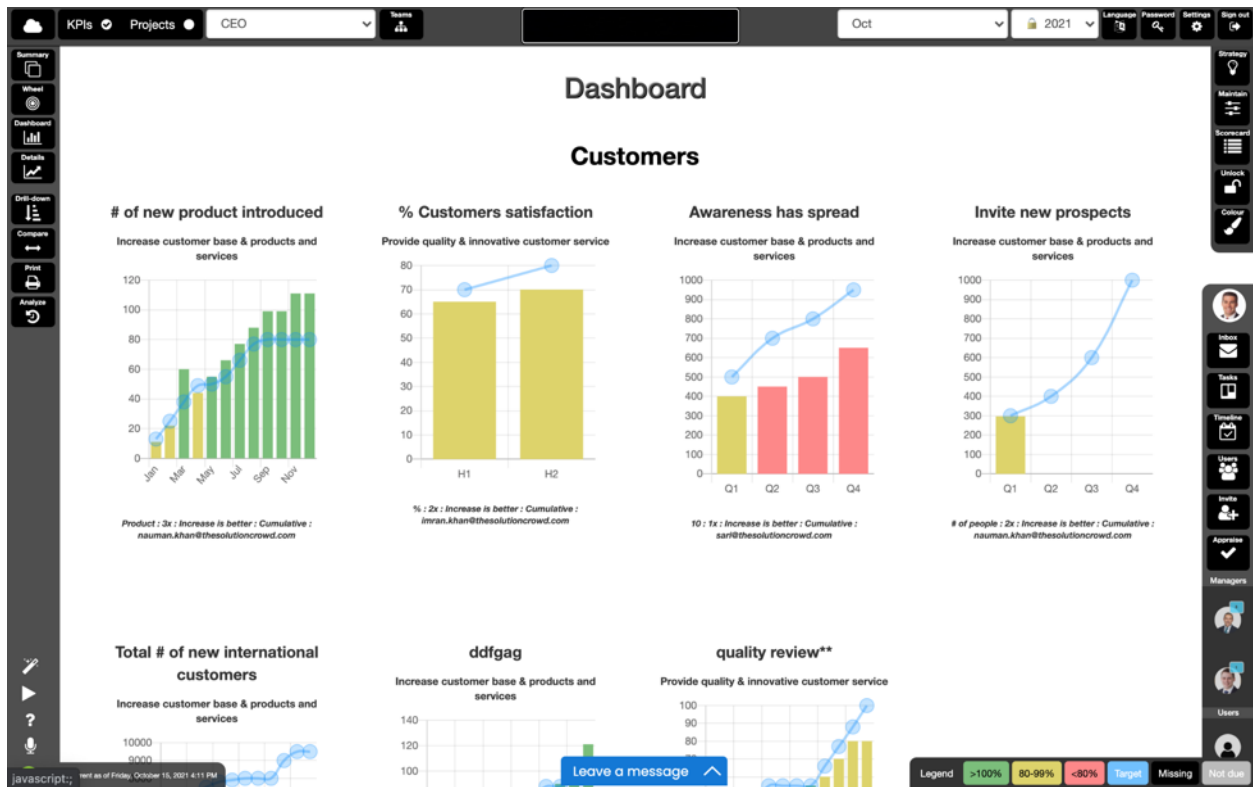






Kippy – Features





| | CEO | Business Support | MENA | Operations | Information Technology | Human Resources | Sales | Ak |
|--|--------|------------------|--------|------------|------------------------|-----------------|-------|----|
| Perspective Customers | | | | | | | | |
| Objective Increase customer base & products and services | 101.9% | | 101.5% | | | | 53.5% | |
| Objective Provide quality & innovative customer service | 108.4% | | 101.5% | | | | 42.3% | |
| Objective Provide quality & innovative customer service | 91% | | | | | | 87% | |
| Perspective Finance | | | | | | | | |
| Objective Maximize revenues & returns from core and new business | 80.9% | 112% | 90.3% | 106% | 100% | 120% | 83.2% | |
| Objective Optimize capital & operating expenditure | 84.4% | | | | | | | |
| Objective Optimize capital & operating expenditure | 75% | 112% | 112% | 93.5% | 100% | 120% | 100% | |
| Perspective Internal Process | | | | | | | | |
| Objective Build effective organization governance | 77.3% | 72% | 100% | 113% | 84.5% | 126% | 57.6% | |
| Objective Build effective organization governance | | | | 79% | | | 44.3% | |
| Objective Improve & automate efficient processes | 77.3% | 72% | 100% | 130% | 84.5% | 126% | 111% | |
| Perspective People | | | | | | | | |
| Objective Attract & retain & develop capable talent | 105.5% | 136.5% | 78.5% | 108.7% | 125% | 83.8% | 79.7% | |
| Objective Attract & retain & develop capable talent | 100% | 73% | 75% | 125% | 125% | 75% | 75% | |
| Objective Build a performance driven culture | 111% | 200% | 82% | 100.5% | 125% | 86.7% | 82% | |

Current as of Friday, October 15, 2021 4:11 PM

Leave a message ^

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



KPIs

Projects

CEO

Teams

Oct

2021

Language

Password

Settings

Sign out

Summary

What's new

Dashboard

Details

Drill-down

Compare

Print

Analyze

Strategy

Maintain

Scorecard

Unlock

Colour

Profile

Inbox

Tasks

Timeline

Users

Invite

Approve

Managers

Users

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% |

Current as of Friday, October 15, 2021 4:11 PM

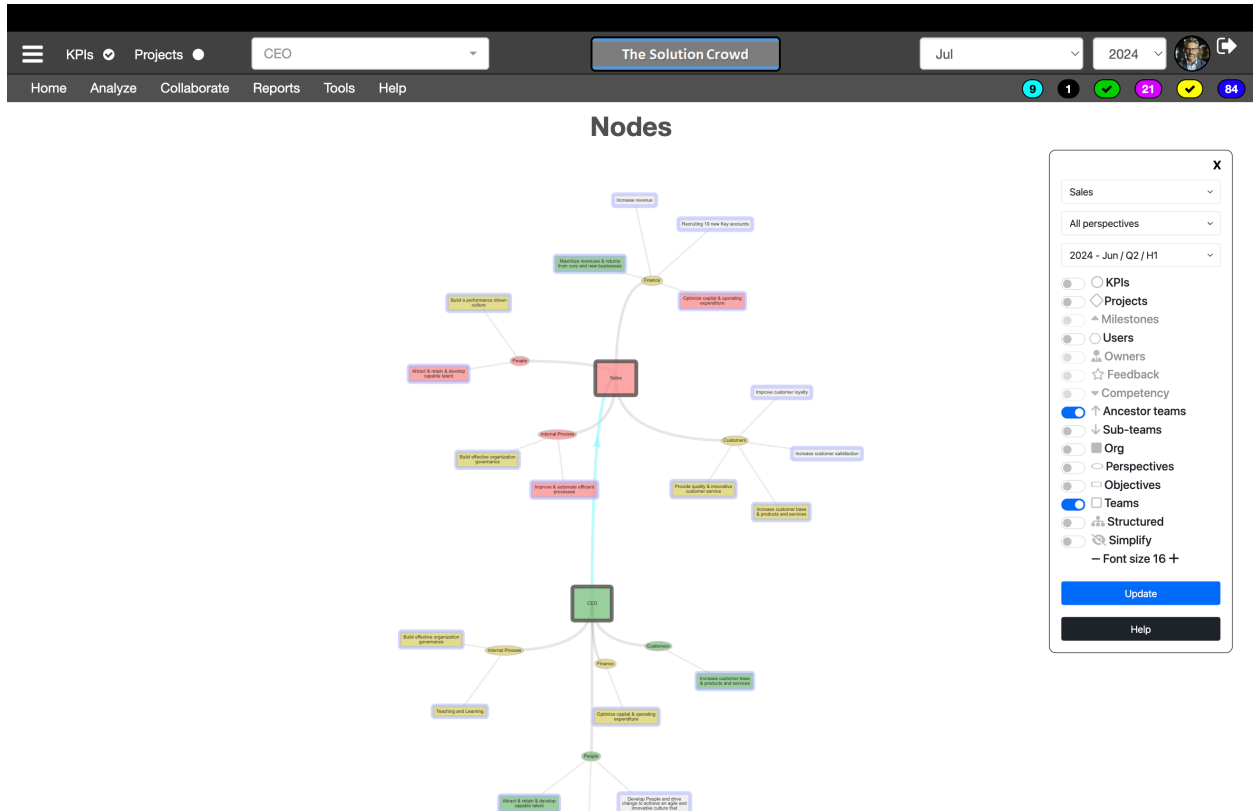
Leave a message

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



Analyze

You can analyze your data by different dimensions.



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



☰

KPIs

Projects

CEO

The Solution Crowd

Jul

2024

HomeAnalyzeCollaborateReportsToolsHelp

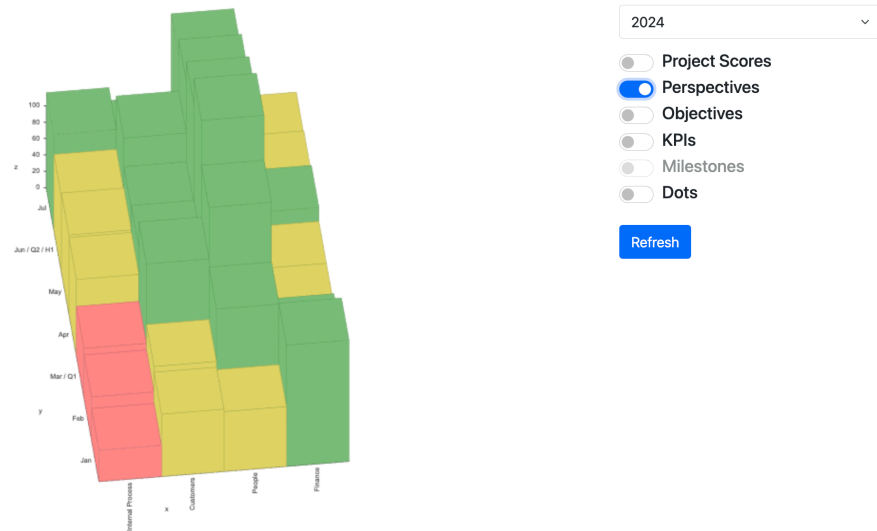
0

1

21

84

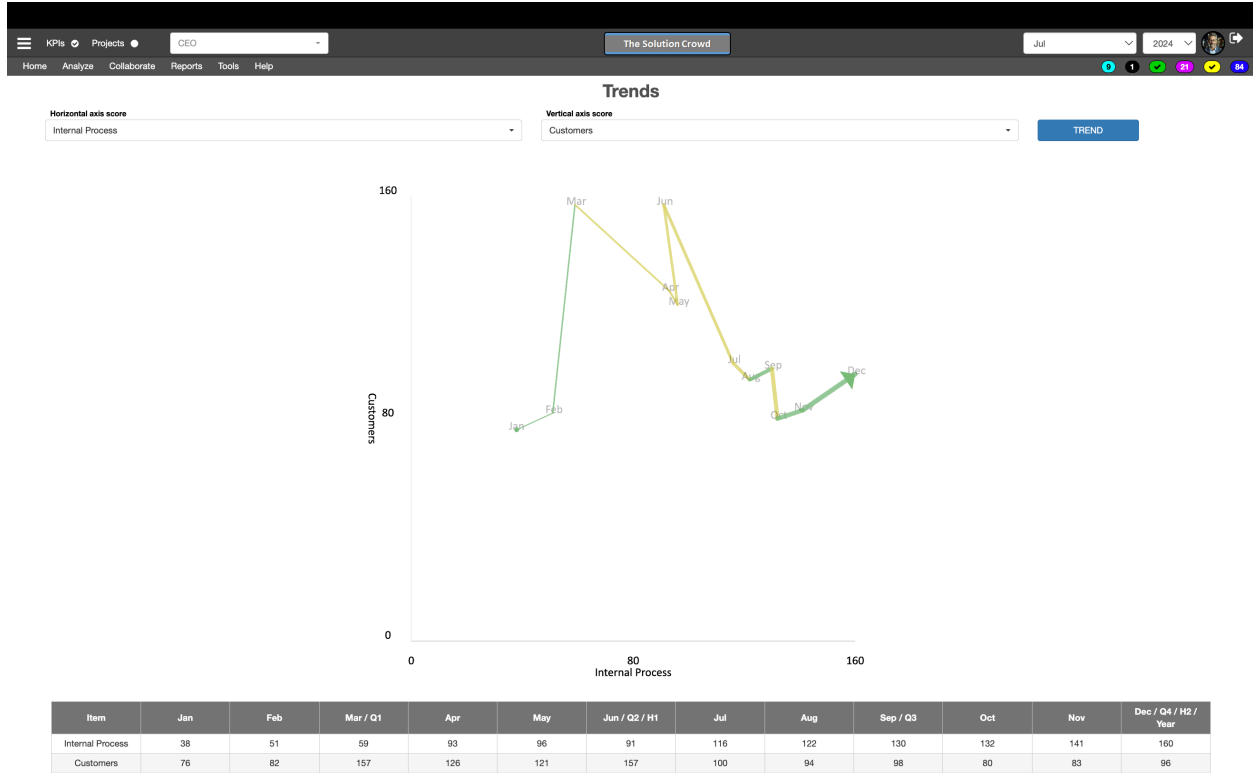
Graphs



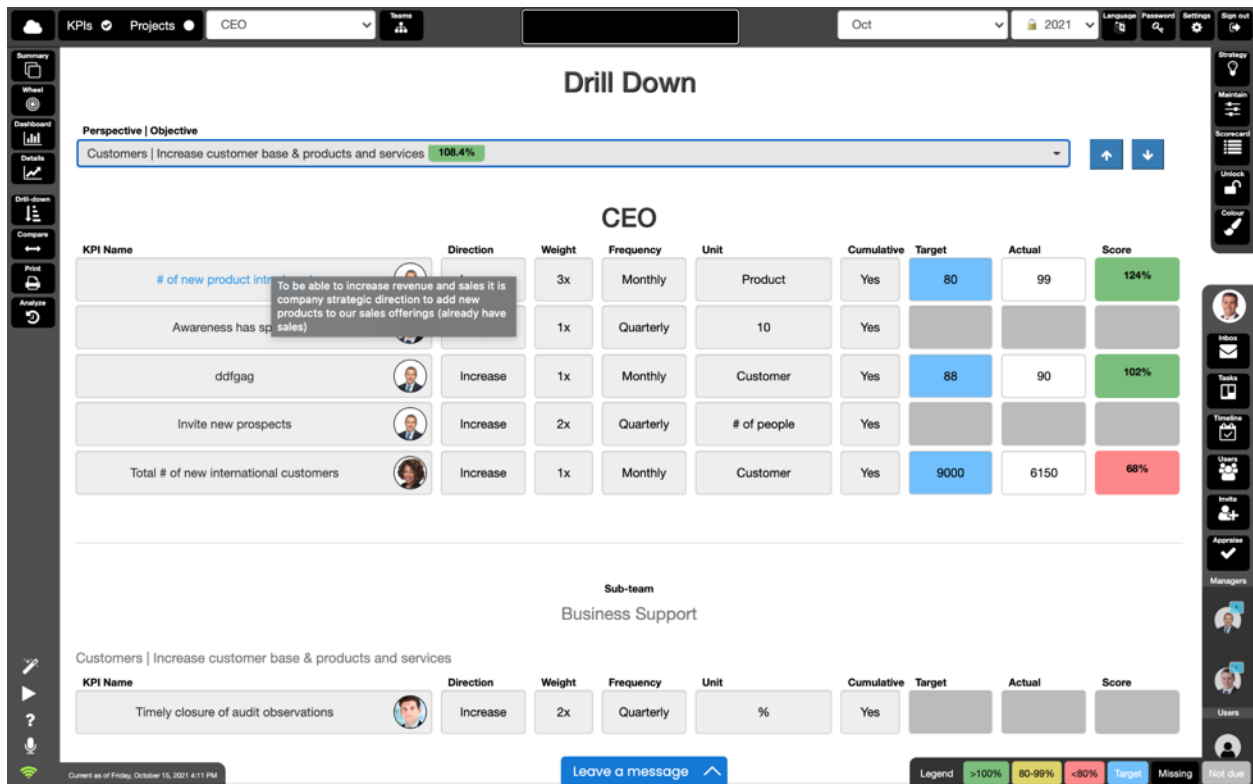
Drag with your mouse to change the perspective. Hover over the filters to learn more.



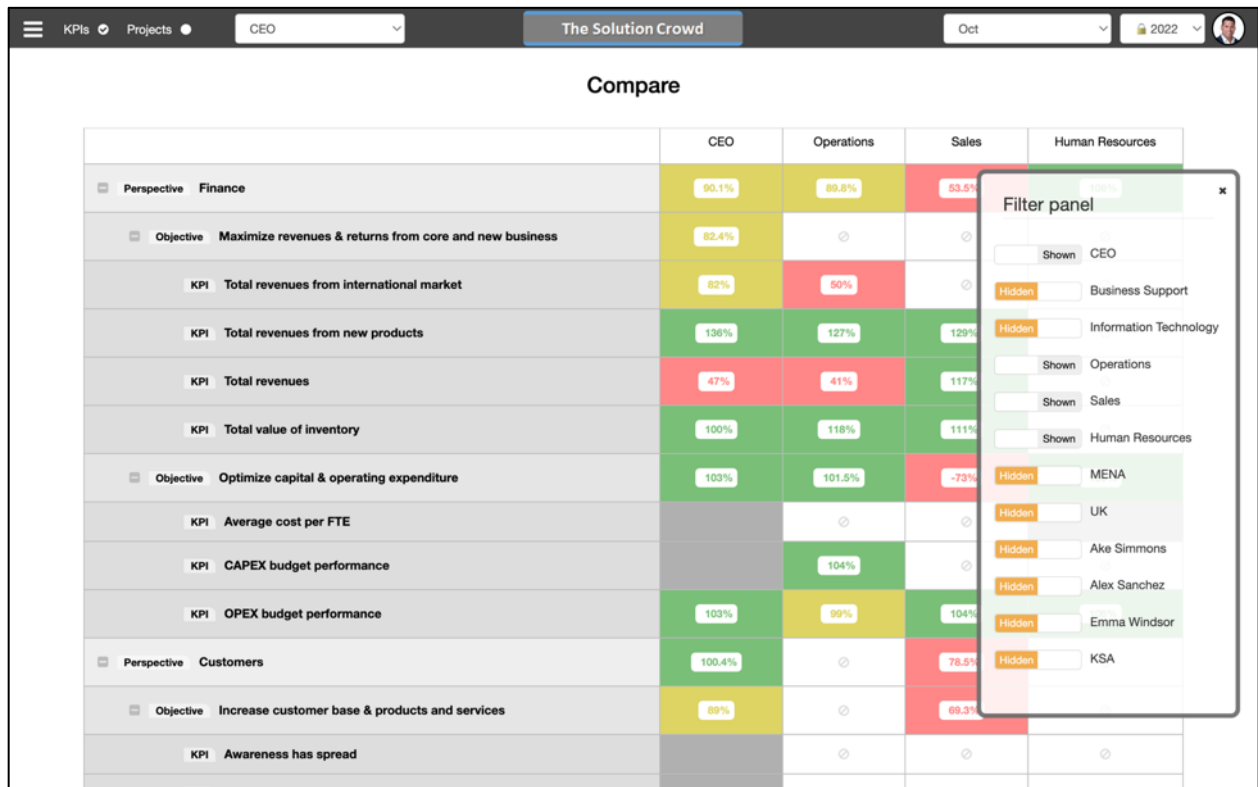
Kippy – Features



Compare how two items are trending over the year.



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



The screenshot shows the 'Compare' dashboard in Kippy. The top navigation bar includes 'KPIs', 'Projects', a dropdown for 'CEO', the company name 'The Solution Crowd', a date dropdown for 'Oct', and a year dropdown for '2022'. The main table displays performance metrics for four perspectives: Finance, Customers, and two others. The columns represent different departments: CEO, Operations, Sales, and Human Resources. A filter panel is open on the right, allowing users to show or hide columns for various departments and regions.

| | CEO | Operations | Sales | Human Resources |
|---|--------|------------|-------|-----------------|
| Perspective Finance | 90.1% | 89.8% | 53.5% | |
| Objective Maximize revenues & returns from core and new business | 82.4% | | | |
| KPI Total revenues from international market | 82% | 60% | | |
| KPI Total revenues from new products | 136% | 127% | 129% | |
| KPI Total revenues | 47% | 41% | 117% | |
| KPI Total value of inventory | 100% | 118% | 111% | |
| Objective Optimize capital & operating expenditure | 103% | 101.5% | 73% | |
| KPI Average cost per FTE | | | | |
| KPI CAPEX budget performance | | 104% | | |
| KPI OPEX budget performance | 103% | 99% | 104% | |
| Perspective Customers | 100.4% | | 78.5% | |
| Objective Increase customer base & products and services | 89% | | 69.3% | |
| KPI Awareness has spread | | | | |

Filter panel

- Shown: CEO
- Hidden: Business Support
- Hidden: Information Technology
- Shown: Operations
- Shown: Sales
- Shown: Human Resources
- Hidden: MENA
- Hidden: UK
- Hidden: Ake Simmons
- Hidden: Alex Sanchez
- Hidden: Emma Windsor
- Hidden: KSA

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

Strategy map

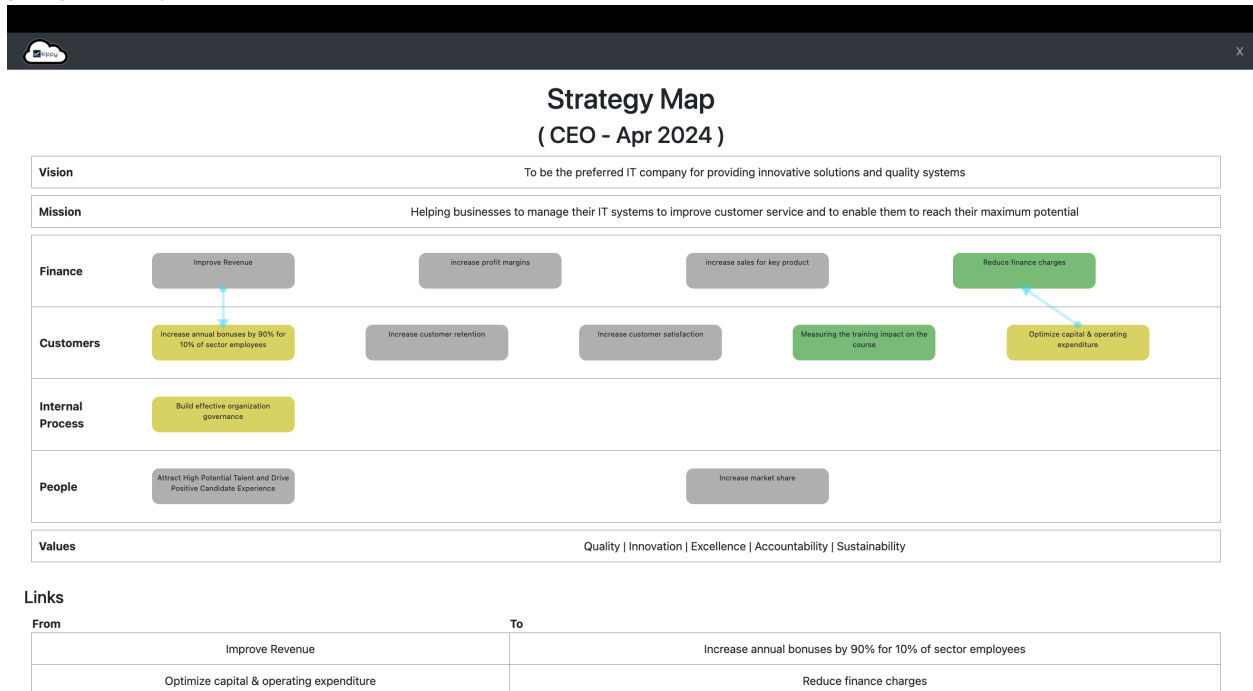
View the org wide stragtegy on a strategy map.

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).



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 |
|--|--------|-----------|-----------------|
| Alem Selimovic (alem.selimovic@thesolutioncrowd.com) | 27 | 27 | 08-Aug-2023 |
| Bobby Blake (bob@thesolutioncrowd.com) | 2 | 1 | 07-Aug-2023 |
| Joe Mardesrt (joe@thesolutioncrowd.com) | 5 | 5 | 07-Aug-2023 |
| Owen Turner (owner@thesolutioncrowd.com) | 4 | 4 | 30-Jun-2023 |
| Hi Jones (hi@thesolutioncrowd.com) | 5 | 5 | 29-Jun-2023 |
| Mike Bowni (test@thesolutioncrowd.com) | 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 |

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KPI Lens | CEO



| [Annual](#) | [Sub-team KPIs](#) | [Drill-down KPIs](#) | [9-Box](#) |

Annual 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 Leadership capacity and Increase Team effectiveness | # of employees on sick leave | 1x | Owen Turner | Employee | No | Decrease is better | Quarterly | -1 - (-) | -1 - (-) | 7 8 (71%) | -1 - (-) | -1 - (-) | -1 6 (-) | -1 - (-) | -1 7 (-) | -1 7 (-) | -1 - (-) | -1 - (-) | -1 8 (-) |
| People | Improve HR Infrastructure and Policy Capacity | # of innovation ideas submitted | 1x | Alem Selimovic | Idea | Yes | Increase is better | Monthly | 5 11 (500%) | 5 11 (500%) | 5 11 (500%) | 5 11 (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 | -1 1 (-) | -1 2 (-) | 1 3 (33%) | 1 5 (20%) | 1 5 (20%) | -1 5 (-) | 2 6 (33%) | 2 6 (33%) | 2 6 (33%) | -1 6 (-) | 3 8 (37%) | 3 10 (30%) |
| Finance | Improve Working Capital | # of new product introduced | 3x | Nauman Khan | Product | Yes | Increase is better | Monthly | 3 11 (300%) | 1 11 (100%) | 1 11 (100%) | 2 11 (200%) | 4 2 (200%) | 2 2 (100%) | 2 2 (100%) | 2 2 (100%) | 2 3 (67%) | 2 3 (67%) | 3 3 (100%) | 4 3 (133%) |
| People | Improve HR Infrastructure and Policy Capacity | # projects started | 2x | Mike Bowmi | 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 (60%) | 9 10 (90%) | 10 10 (100%) |
| Customers | Provide quality & innovative customer service | % Customers satisfaction | 2x | Imran Khan | % | Yes | Increase is better | Semi-annual | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 60 70 (86%) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 90 85 (100%) |
| People | Build Leadership capacity and Increase Team effectiveness | % Employees Turnover | 1x | Imran Khan | % | Yes | Decrease is better | Semi-annual | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 5 15 (300%) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 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%) | -1 95 (-) | 100 95 (105%) |
| Finance | Improve Working Capital | % of customer left | 2x | Nauman Khan | | Yes | Decrease is better | Monthly | -1 11 (-) | 11 15 (136%) | 11 16 (145%) | 11 17 (155%) | 40 18 (45%) | 12 20 (167%) | 16 30 (187%) | 16 31 (187%) | 16 32 (200%) | 18 33 (183%) | 19 35 (184%) | 20 35 (175%) |
| Customers | Optimize capital & operating expenditure | Average cost per FTE | 1x | Alem Selimovic | Mill. USD | Yes | Decrease is better | Yearly | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 1.79 2.5 (140%) |
| People | Improve HR Infrastructure and Policy Capacity | Average employee satisfaction rating | 1x | Alem Selimovic | % | No | Increase is better | Yearly | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 65 75 (87%) |
| People | Build Leadership capacity and Increase Team effectiveness | Average training hours per FTE | 1x | Imran Khan | Hour | Yes | Increase is better | Monthly | 5 5 (100%) | 5 5 (100%) | 5 5 (100%) | -1 10 (-) | 5 10 (50%) | 6 10 (60%) | 6 10 (60%) | 6 10 (60%) | 6 15 (40%) | 8 15 (53%) | 10 15 (67%) | 10 15 (67%) |
| Finance | Improve Working Capital | Awareness has spread | 1x | Sari Kana | new prospects | Yes | Increase is better | Quarterly | -1 - (-) | -1 - (-) | 60 80 (75%) | -1 - (-) | -1 - (-) | 65 90 (72%) | -1 - (-) | -1 - (-) | 70 95 (74%) | -1 - (-) | -1 - (-) | 75 100 (75%) |
| Customers | Optimize capital & operating expenditure | CAPEX budget performance | 2x | Alem Selimovic | % | Yes | Decrease is better | Quarterly | -1 - (-) | -1 - (-) | 60 95 (158%) | -1 - (-) | -1 - (-) | 70 95 (136%) | -1 - (-) | -1 - (-) | 80 95 (119%) | -1 - (-) | -1 - (-) | 120 100 (83%) |
| Finance | Improve Working Capital | Customer churn | 1x | Owen Turner | 000's | Yes | Increase is better | Yearly | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | -1 - (-) | 25 15 (167%) |

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



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

Review KPIs

Nauman Khan (nauman.khan@thesolutioncrowd.com)

Search

| Team | KPI Name | Frequency | Forecast | Actual | Score | Last submission | Approval |
|-------|--------------------------------------|-----------|----------|--------|-------|-----------------|------------|
| CEO | # of new product introduced | Monthly | 2 | 2 | 100 | 14-May-2023 | Approve |
| CEO | % of customer left | Monthly | 20 | 12 | 167 | 17-Feb-2023 | Not needed |
| CEO | Invite new prospects | Quarterly | 5 | 5 | 100 | 07-Jun-2023 | Not needed |
| CEO | Quality review | Monthly | 1 | 2 | 200 | 08-Jun-2023 | Not needed |
| Sales | Timely closure of audit observations | Monthly | 1 | 2 | 200 | 11-Jun-2023 | Not needed |
| CEO | Total # of customers | Monthly | 200 | 26 | 13 | 11-Jun-2023 | Not needed |
| Sales | Total revenues | Monthly | 20 | 66 | 330 | 11-Jan-2023 | Approve |



Sub-team Report
(CEO - 2023)

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 | 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) | 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) | 100 / 100 (0) | 100 / 100 (0) | 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) | 100 / 100 (0) | 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) | 100 / 100 (0) | 100 / 100 (0) | 100 / 100 (0) |

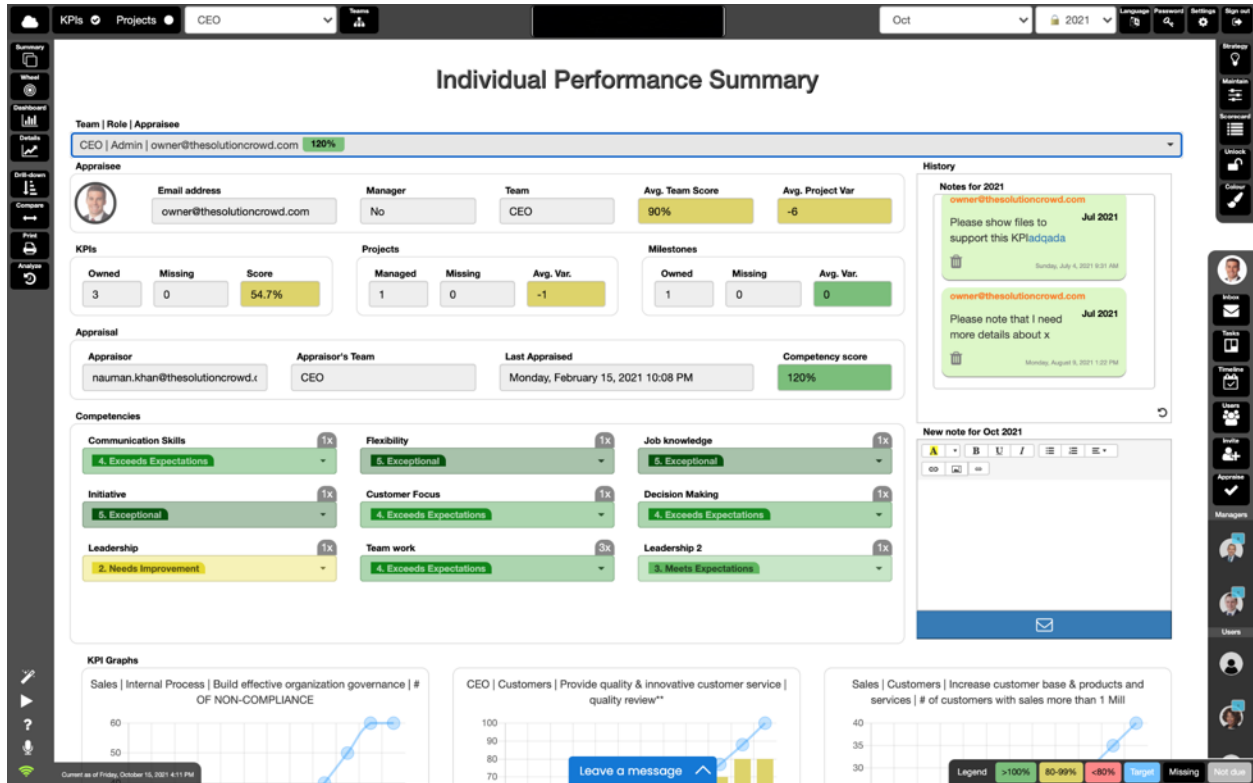
| Expansion International Action Plan | | | | | | | | | | | | | | | | | | | |
|---------------------------------------|-------------------------|-------------------------------------|-----------------|-----------------|-----------------|-------------|-------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| 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 |
| 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) | 2 / 1 (1) |

| 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 | Build Leadership capacity and increase Team effectiveness | Human Capital Development | 1x | Alem Selimovic | Nauman Khan | 12-Jan-2019 | 12-Oct-2020 | 8 / 13 (-5) | 25 / 28 (-3) | 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 | | | |
| Develop and endorse the action plan | 1x | Imran Khan | 22-Feb-2019 | 29-Apr-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) | 100 / 100 (0) | 100 / 100 (0) | 100 / 100 (0) |

See Quick Links video for full demo of all screens.

Staff performance

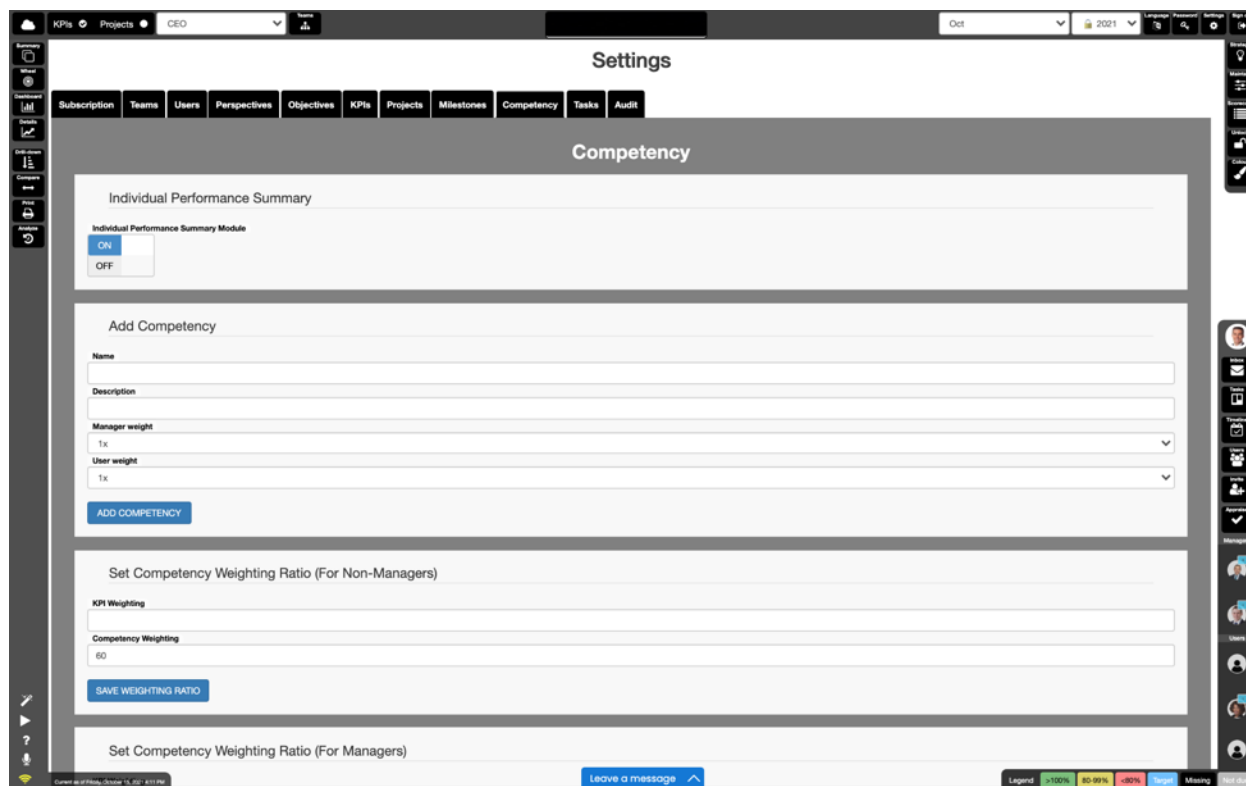
The individual performance summary of each employee shows the live calculated performance score of that employee, in relation to their weighted score based on their forecast and actuals, for all individual and team KPI and milestones they are responsible for.



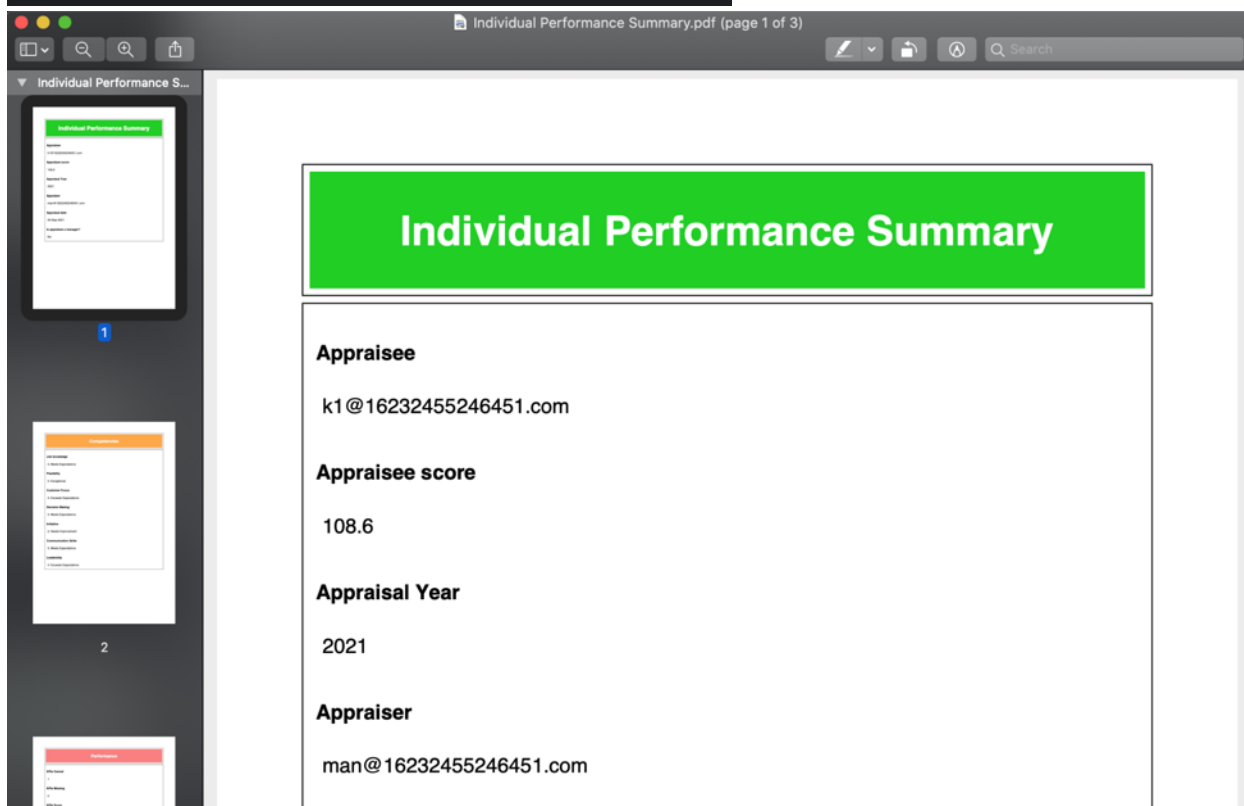
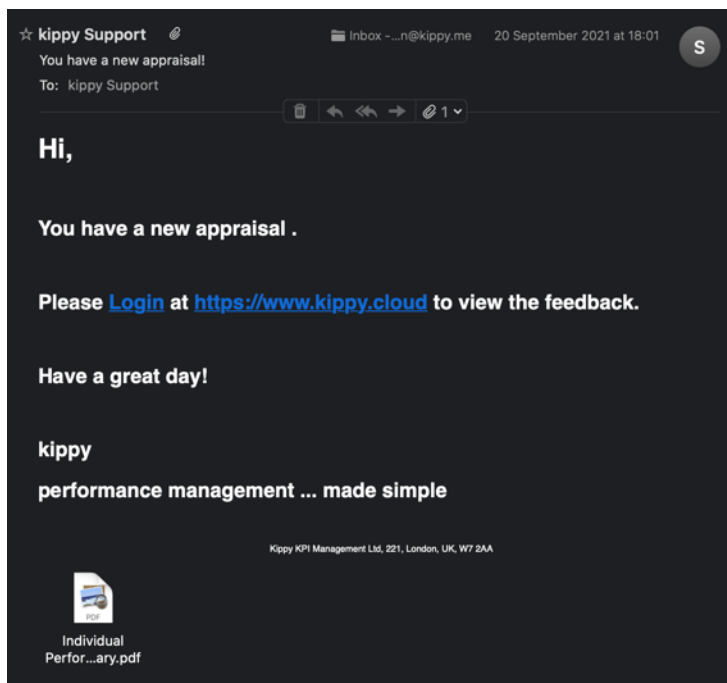
Staff appraisals

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

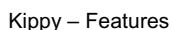
- The competencies are weighted, defined and customized by administrators per the employee's role.
- Appraisals can be performed on a monthly and/or year-to-date basis (for non-cumulative KPIs)



- The 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.

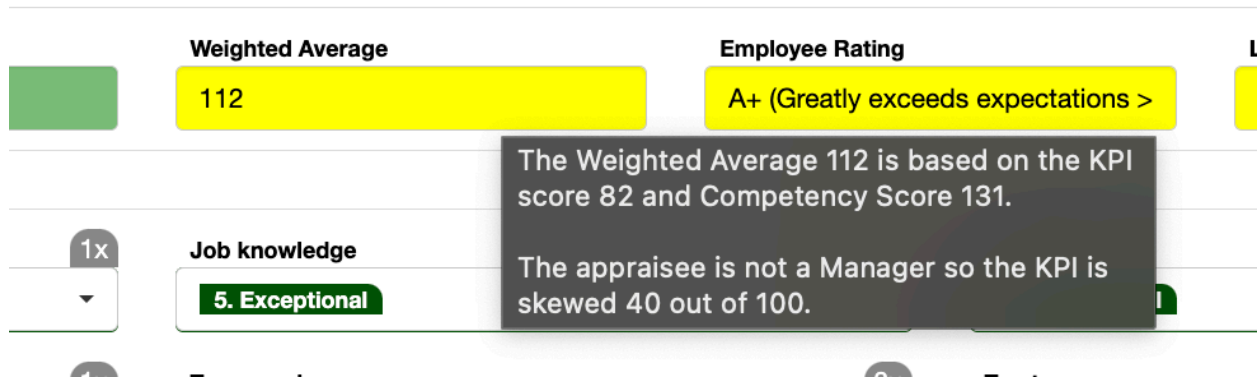


- The appraisal generates an average employee score and rating for the employee based on the weighted average of the performance score and the competency score.

| Team | Role | Appraisee |
|--------|-----------|-----------------|
| Team A | Team Lead | John Doe |
| Team B | Team Lead | Jane Smith |
| Team C | Team Lead | Michael Johnson |
| Team D | Team Lead | Sarah Williams |
| Team E | Team Lead | David Brown |
| Team F | Team Lead | Emily Davis |
| Team G | Team Lead | James Wilson |
| Team H | Team Lead | Alice Taylor |
| Team I | Team Lead | Robert Miller |
| Team J | Team Lead | Olivia Moore |
| Team K | Team Lead | William Clark |
| Team L | Team Lead | Sophia Lewis |
| Team M | Team Lead | Benjamin Hall |
| Team N | Team Lead | Isabella King |
| Team O | Team Lead | Lucas Scott |
| Team P | Team Lead | Mia Green |
| Team Q | Team Lead | Noah Adams |
| Team R | Team Lead | Ava Baker |
| Team S | Team Lead | Ethan Nelson |
| Team T | Team Lead | Charlotte Hill |
| Team U | Team Lead | Leo Garcia |
| Team V | Team Lead | Amelia Perez |
| Team W | Team Lead | Isaac Roberts |
| Team X | Team Lead | Grace Turner |
| Team Y | Team Lead | Samuel Phillips |
| Team Z | Team Lead | Chloe Evans |

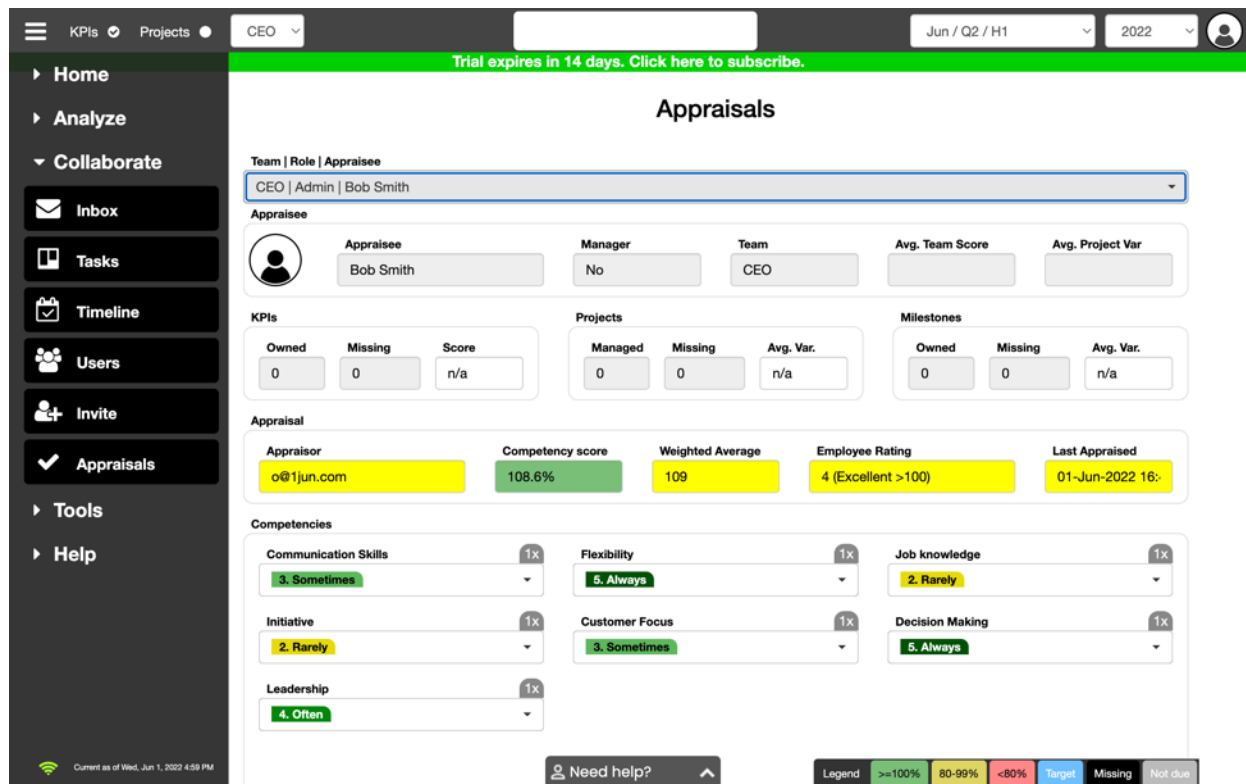
Appraisee

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.

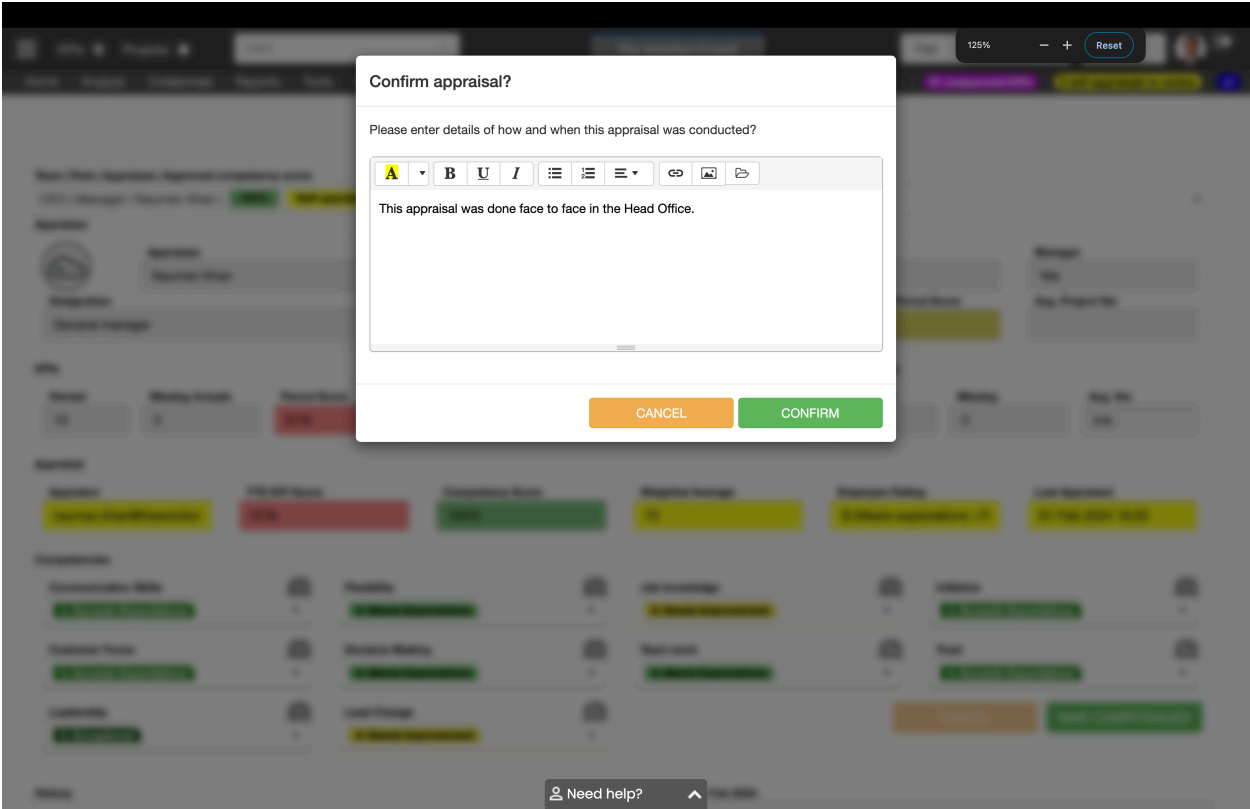


The screenshot shows the 'Appraisals' section of the Kippy dashboard. The interface includes a sidebar with navigation options: Home, Analyze, Collaborate, Inbox, Tasks, Timeline, Users, Invite, Appraisals, Tools, and Help. The main content area displays a form for creating or editing an appraisal for 'Bob Smith' (Appraisee) by 'o@1jun.com' (Appraiser). The form includes fields for Manager (No), Team (CEO), and various scores (Competency score: 108.6%, Weighted Average: 109, Employee Rating: 4 (Excellent >100)). Below these are sections for KPIs, Projects, and Milestones, each with 'Owned', 'Missing', and 'Score' or 'Avg. Var.' fields. The 'Competencies' section lists several skills with dropdown menus for rating: Communication Skills (3. Sometimes), Flexibility (5. Always), Job knowledge (2. Rarely), Initiative (2. Rarely), Customer Focus (3. Sometimes), Decision Making (5. Always), and Leadership (4. Often). A legend at the bottom right indicates color-coded status: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and 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.





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 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% 80-99% <80% Target Missing Not due



Employee Rating Report

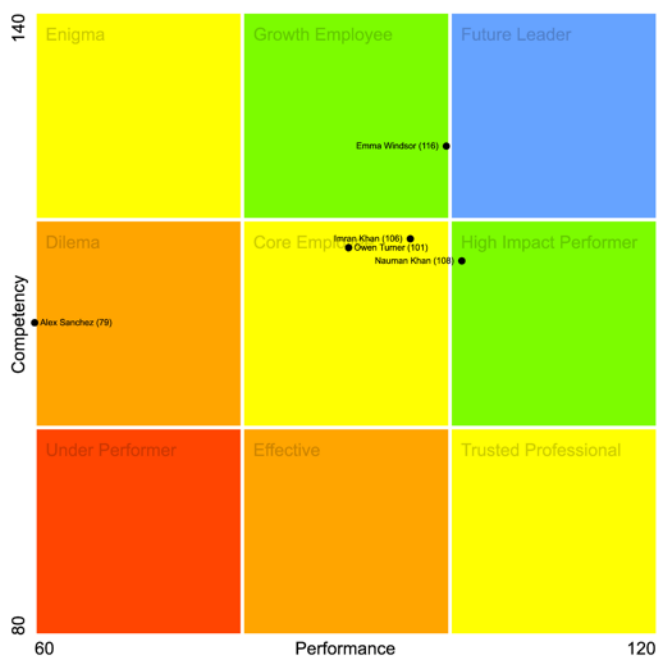
| Employee email | Is manager | KPI Score | Comp Score | Avg | Weighted Avg | Rating |
|-------------------------------------|------------|-----------|------------|-----|--------------|--------------------|
| lina@thesolutioncrowd.com | Yes | | | | | |
| alex.sanchez@thesolutioncrowd.com | No | 0 | | 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





 Sign out

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

 Sign out

| | | | | | | | | | |
|--------------------|---|------------------------|-----|----------------|----------------------------------|-----|-----|----|-------------------|
| 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



Kippy – Features

Competencies

| Employee | Communication Skills | Customer Focus | Decision Making | Flexibility | Initiative | Job knowledge | Lead Change | Leadership | Team work | Trust |
|-------------|----------------------|----------------|-----------------|-------------|------------|---------------|-------------|------------|-----------|-------|
| Bobby Blake | | | | | | | | | | |
| Hi Jones | | | | | | | | | | |
| Owen Turner | | | | | | | | | | |
| Joe Mardest | | | | | | | | | | |
| TOTAL | 7 | 6 | 9 | 9 | 9 | 9 | 4 | 6 | 12 | 11 |
| AVERAGE | 1.8 | 1.5 | 2.3 | 2.3 | 2.3 | 2.3 | 1.0 | 1.5 | 3.0 | 2.8 |

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 Mardest | 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

| Employee | Automation | Communication Skills | Customer Focus | Decision Making | Flexibility | Initiative | Job knowledge | Leadership | Testing |
|----------|------------|----------------------|----------------|-----------------|-------------|------------|---------------|------------|---------|
| Usain | | | | | | | | | |
| Sue | | | | | | | | | |
| Owen | | | | | | | | | |
| TOTAL | 2 | 4 | 6 | 2 | 5 | 9 | 3 | 7 | 4 |
| AVERAGE | 2.0 | 2.0 | 3.0 | 1.0 | 2.5 | 4.5 | 1.5 | 3.5 | 4.0 |

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 | | | | | |

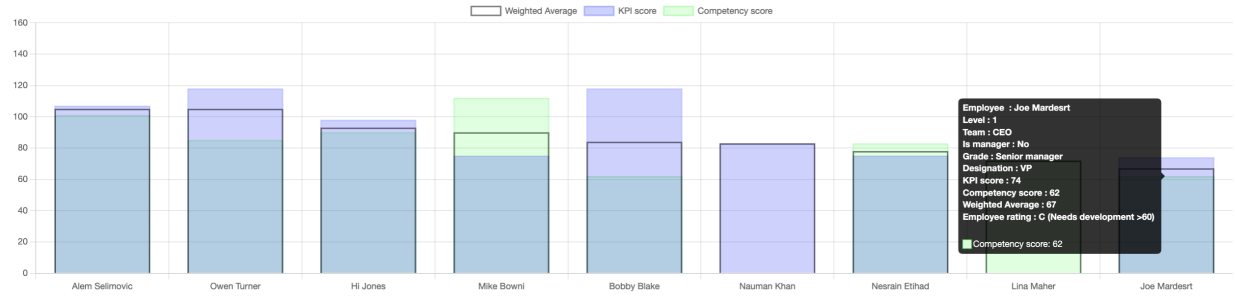
Notes

Interactive graphs also show ordered performance by employees and teams.



Kippy – Features

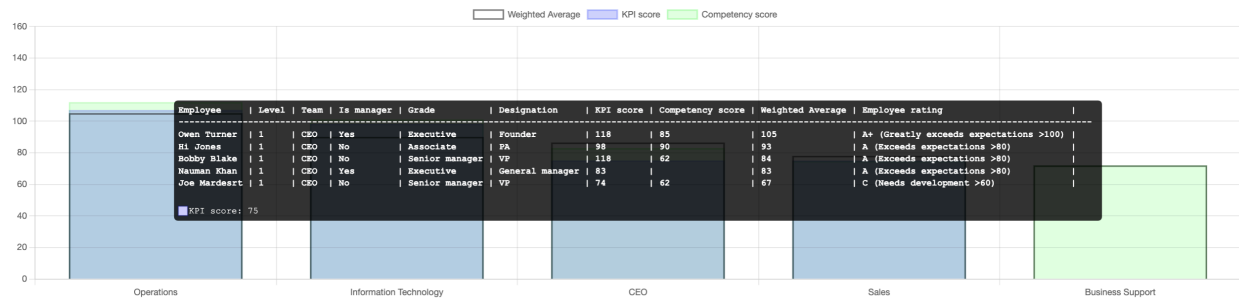
By employee



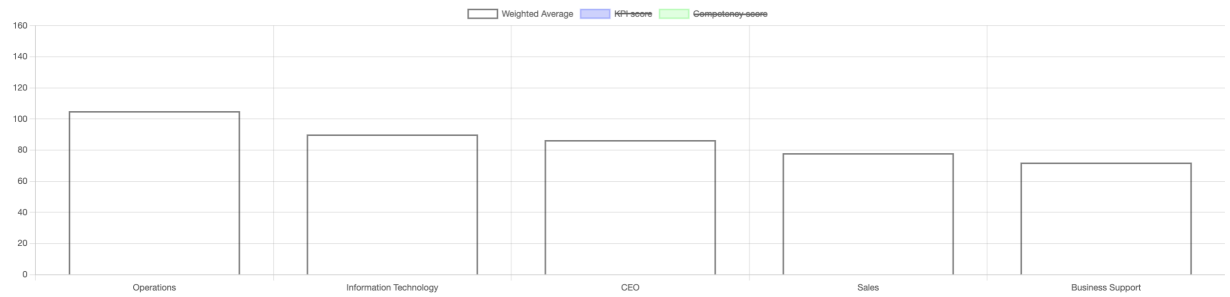
By team

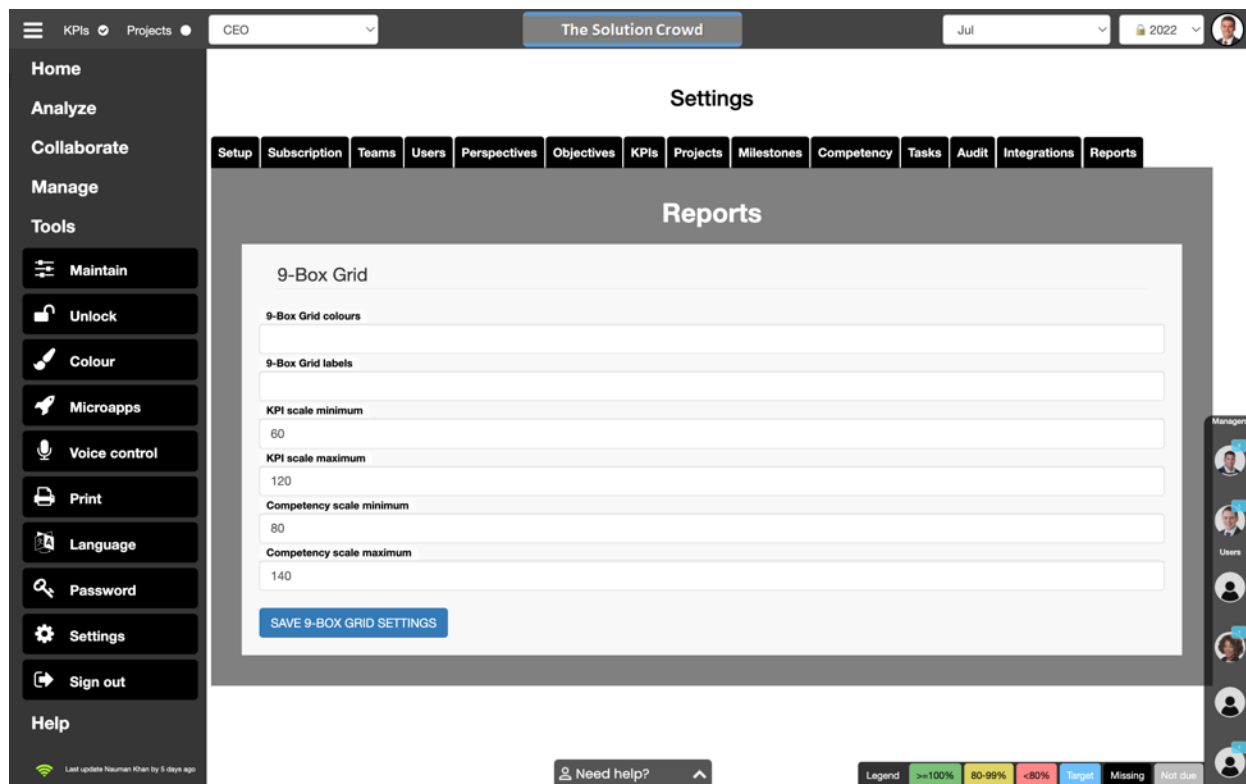


By team



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.



Sign out

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 Ethad | 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 |

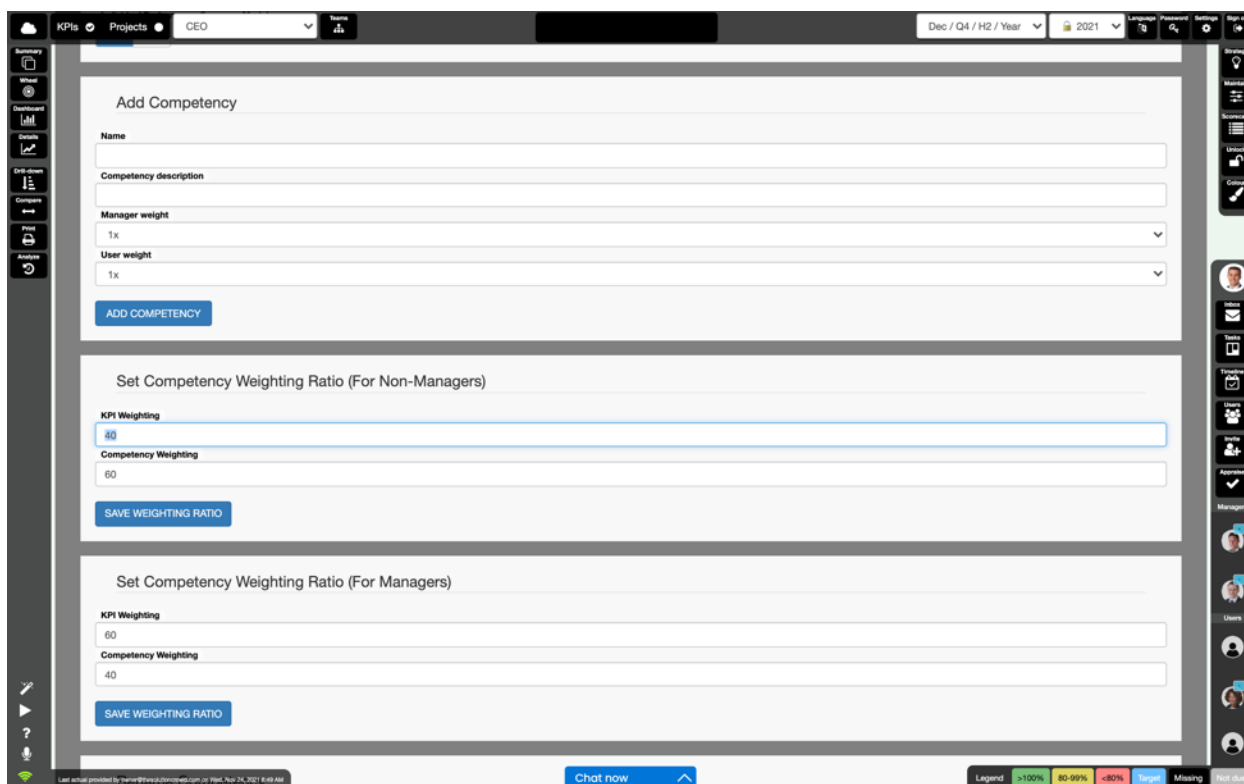
[Back](#) [Print](#) [Download](#)

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.

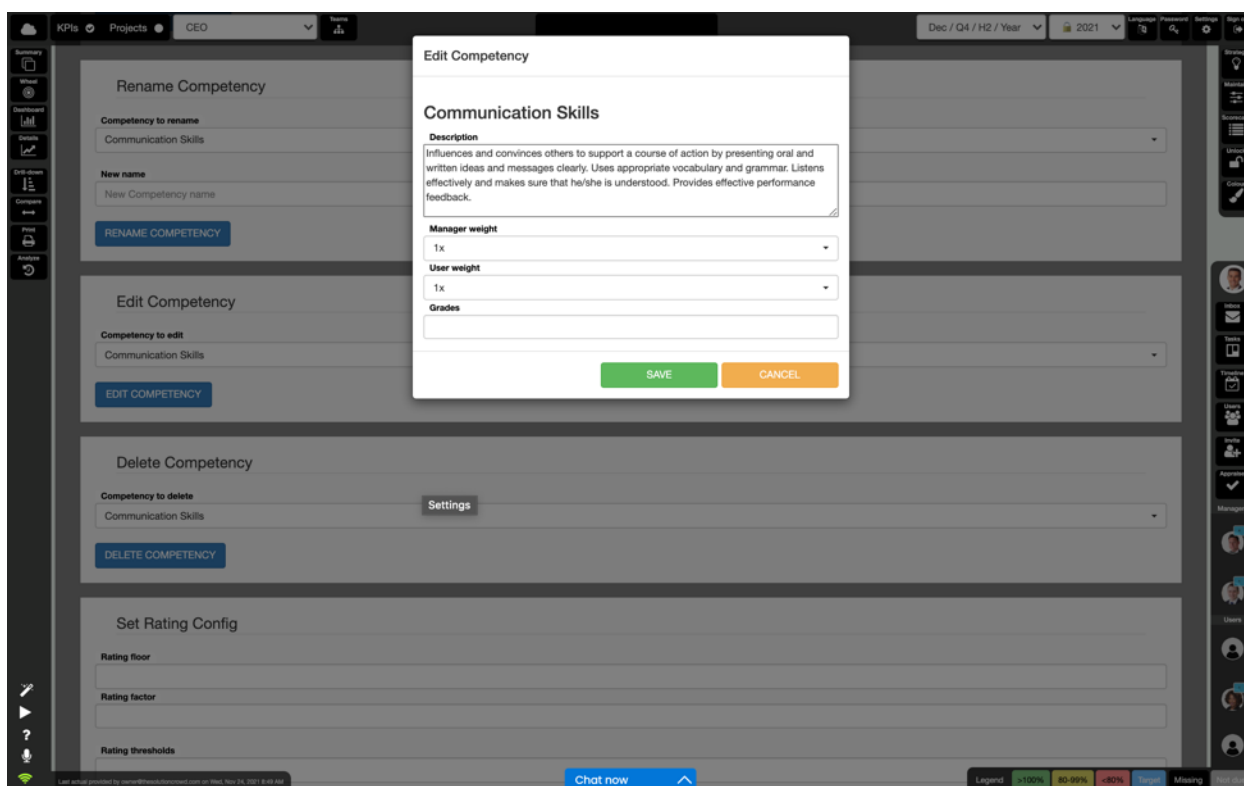


The screenshot shows the 'Add Competency' form in the Kippy application. The form is divided into three main sections:

- Add Competency:** Contains fields for 'Name', 'Competency description', 'Manager weight' (set to 1x), and 'User weight' (set to 1x). A blue 'ADD COMPETENCY' button is at the bottom.
- Set Competency Weighting Ratio (For Non-Managers):** Contains fields for 'KPI Weighting' (set to 40) and 'Competency Weighting' (set to 60). A blue 'SAVE WEIGHTING RATIO' button is at the bottom.
- Set Competency Weighting Ratio (For Managers):** Contains fields for 'KPI Weighting' (set to 60) and 'Competency Weighting' (set to 40). A blue 'SAVE WEIGHTING RATIO' button is at the bottom.

The interface includes a top navigation bar with 'KPIs', 'Projects', and 'CEO' tabs. A right sidebar contains various icons for navigation and settings. A bottom status bar shows a 'Chat now' button and a legend for performance levels: >100% (green), 80-99% (yellow), <80% (red), and Missing (grey).

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



The screenshot shows the 'Edit Competency' form in the Kippy application, with a modal overlay for editing the 'Communication Skills' competency.

Edit Competency Modal:

- Communication Skills**
- Description:** Influences and convinces others to support a course of action by presenting oral and written ideas and messages clearly. Uses appropriate vocabulary and grammar. Listens effectively and makes sure that he/she is understood. Provides effective performance feedback.
- Manager weight:** 1x
- User weight:** 1x
- Grades:** (empty field)
- Buttons:** SAVE (green), CANCEL (orange)

Background Form:

- Rename Competency:** Fields for 'Competency to rename' (Communication Skills) and 'New name' (New Competency name). A blue 'RENAME COMPETENCY' button.
- Edit Competency:** Fields for 'Competency to edit' (Communication Skills). A blue 'EDIT COMPETENCY' button.
- Delete Competency:** Fields for 'Competency to delete' (Communication Skills). A blue 'DELETE COMPETENCY' button.
- Set Rating Config:** Fields for 'Rating floor', 'Rating factor', and 'Rating thresholds'.

The interface includes a top navigation bar with 'KPIs', 'Projects', and 'CEO' tabs. A right sidebar contains various icons for navigation and settings. A bottom status bar shows a 'Chat now' button and a legend for performance levels: >100% (green), 80-99% (yellow), <80% (red), and Missing (grey).



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.



Microapps

Acknowledgements

Please sign in

Email address

Password

Sign in

© 2022

Sign out

Select user to acknowledge

Search

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

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 ...

Save

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

KPIs Projects Sales Teams

exorg.com

Jan 2022

Logout Feedback Sign out

Summary

Overview

Dashboard

Details

Self-review

Compare

Print

Analysis

Review

Feedback

Star

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

250

Need help?

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

Messages

Tasks

Timeline

Users

Invite

Assessments

Admins

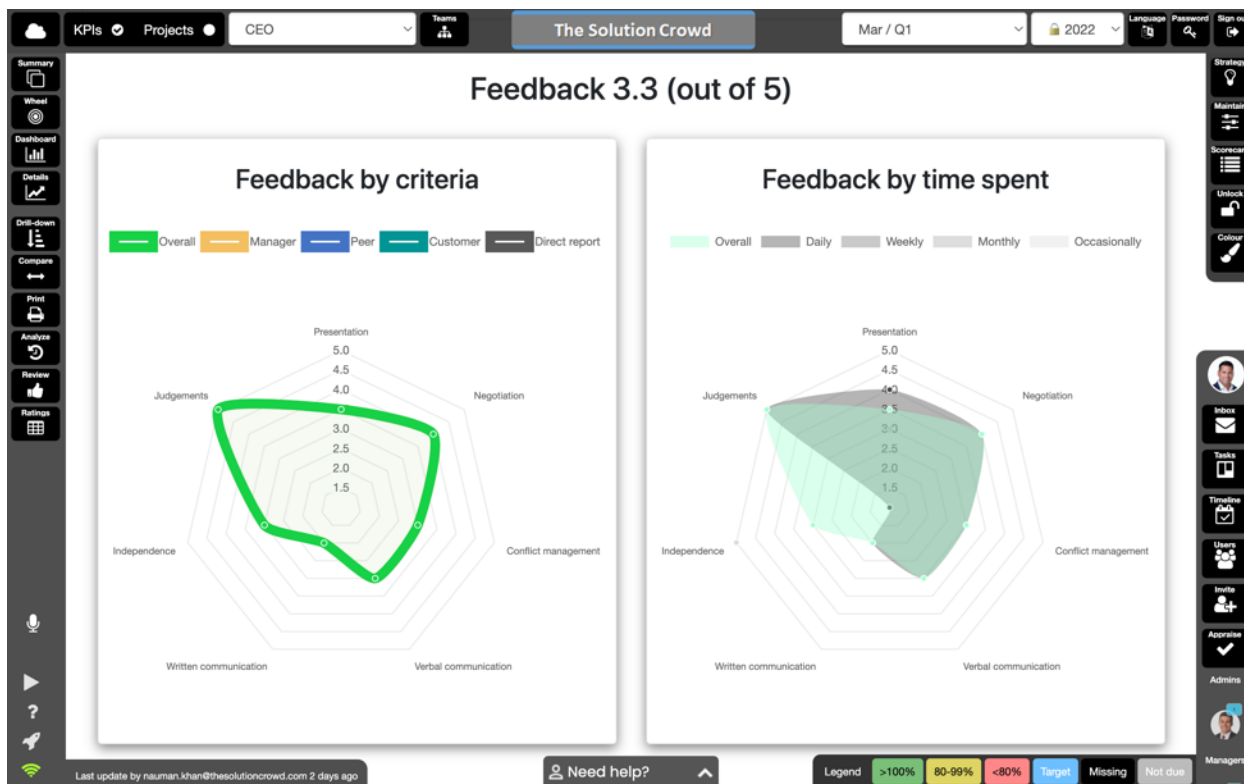


The feedback can also be left via the main kippy app clicking on a user's avatar.

The feedback criteria are configurable in the setting screen.

The screenshot shows the 'Set Rating Config' interface within the Kippy application. The top navigation bar includes 'KPIs', 'Projects', 'CEO', 'Teams', a search bar, and filters for 'Mar / Q1' and '2022'. The left sidebar contains icons for Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, and Analyze. The right sidebar includes Strategy, Maintain, Scorecard, Unblock, Colour, and a user profile section with Inbox, Tasks, Timeline, Users, Invite, and Managers. The main content area is titled 'Set Rating Config' and features a 'DELETE COMPETENCY' button at the top. Below this, there are input fields for 'Rating floor', 'Rating factor', and 'Rating thresholds'. A 'Lock appraisals' toggle switch is set to 'OFF'. A 'SAVE WEIGHTING RATIO' button is located below these fields. The second section is titled '360 feedback criteria' and includes a 'Set default 360 feedback criteria' label and a text input field containing 'Presentation, Negotiation, Conflict management, Verbal communication, Written communication, Independence, Judgement'. A 'SAVE DEFAULT 360 FEEDBACK CRITERIA' button is at the bottom of this section. The bottom status bar shows 'Current as of Mon, Mar 21, 2022 6:39 AM', a 'Need help?' button, and a legend with color-coded boxes for '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.

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 | | | |

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



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

Home

Analyze

Collaborate

Reports

Team report

HR Report

KPIs report

Projects report

Milestones

Users report

Objectives

Org report

Risk report

9-Box Grid

Tools

Help

KPIs

Projects

CEO

The Solution Crowd

Dec / Q4 / H2 / Year

2022

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 | | | | | | | | | | | | |

Need help?

10

Yes

Legend

>=100%

80-99%

<80%

Target

Missing

Not due



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 |

KPI Lens | CEO



| Annual | Sub-team KPIs | **Late KPIs** | Red KPIs | Trending-down KPIs | Vertical Report | Drill-down KPIs | 9-Box | Bell-curve |

Late KPIs Report (CEO - 2025)

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|-------------|--|---------------|--------|-------------|----------|------------|--------------------|-----------|------------|-----------------|-------------------|------------------|------------------|-----------------|------------------|---------------|---------------|-----------------|----------------|----------------|
| Customers | Increase customer base & products and services | Cost per Hire | 1x | Nauman Khan | Currency | No | Decrease is better | Monthly | -115.1 (-) | 22 15.2 (69%) | 11 15.25 (132%) | 41 16.25 (37%) | 44 18.45 (42%) | 44 20.8 (48%) | 44 22.99 (52%) | 44 22 (50%) | 44 19 (75%) | 111 33 (100%) | 44 44 (100%) | 55 55 (100%) |

Business Support

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|-------------|--|------------------------------|--------|-------|------|------------|--------------------|-----------|------------|--------------|--------------|--------------|--------------|-------------|-------------|-------------|-------------|--------------|------------|------------|
| Customers | Increase annual bonuses by 90% for 10% of sector employees | Average Revenue per Customer | 1x | | USD | Yes | Increase is better | Monthly | -11 (150%) | 3 2 (150%) | 4 3 (133%) | 5 4 (125%) | 5 5 (100%) | 5 6 (83%) | 5 7 (71%) | 5 8 (62%) | 5 9 (56%) | 6 10 (60%) | - 11 (-) | - 12 (-) |

Information Technology

No late KPIs

Operations

No late KPIs

Sales

No late KPIs

Print

Generated: Sat Mar 01 15:31:51 UTC 2025



KPI Lens | CEO

| Annual | Sub-team KPIs | Late KPIs | Red KPIs | Trending-down KPIs | Vertical Report | Drill-down KPIs | 9-Box | Bell-curve |

Red KPIs Report (CEO - Mar - 2025)

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------------------|--|---|--------|----------------|--------------------------|------------|--------------------|-----------|------------------|--------------------|------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Finance | QQ | Supplier Cost Savings | 1x | Owen Turner | Currency | Yes | Increase is better | Monthly | 2 1 (200%) | 2 2 (100%) | 1 3 (33%) | 5 4 (125%) | 5 5 (100%) | 5 6 (83%) | 5 7 (71%) | 5 8 (62%) | 5 9 (56%) | 6 10 (60%) | - 11 (-) | - 12 (-) |
| Customers | Increase customer base & products and services | Offer Acceptance Rate | 1x | Hi Jones | % | Yes | Increase is better | Monthly | 11 15 (73%) | 22 15 (147%) | 1 15 (7%) | 44 16 (275%) | 44 18 (244%) | 44 20 (220%) | 44 22 (200%) | 44 22 (200%) | 44 33 (133%) | 44 33 (133%) | 44 44 (100%) | 55 55 (100%) |
| Customers | Increase customer base & products and services | Recruitment and Selection | 2x | Owen Turner | Training and development | Yes | Increase is better | Quarterly | - 1 (-) | - 1 (-) | 1 15 (7%) | 1 1 (-) | - 1 (-) | 44 20 (220%) | - 1 (-) | - 1 (-) | 44 33 (133%) | - 1 (-) | - 1 (-) | 55 55 (100%) |
| Customers | Increase customer base & products and services | Return on Investment (ROI) | 1x | Sari Kana | % | No | Increase is better | Monthly | 1 6 (20%) | 2 6 (33%) | 1 6 (20%) | 4 6 (67%) | 6 6 (80%) | 5 6 (80%) | 5 6 (80%) | 7 6 (80%) | 11 6 (20%) | 2 6 (33%) | 3 6 (50%) | 5 6 (80%) |
| Internal Process | Build effective organization governance | Revenue Growth Rate - updated | 1x | Alem Selimovic | % | No | Increase is better | Monthly | 2 10 (20%) | 4 11 (36%) | 6 10 (60%) | 8 10 (80%) | 10 10 (100%) | 8 10 (80%) | 10 10 (100%) | 12 10 (120%) | 15 10 (150%) | 16 10 (160%) | 15 10 (150%) | 13 10 (130%) |
| Internal Process | Teaching and Learning | Employee compliance rate with governance policies | 1x | Alem Selimovic | % | No | Increase is better | Monthly | 33 90 (37%) | 144 90 (160%) | 55 90 (61%) | 66 90 (73%) | 66 90 (73%) | 66 90 (73%) | 66 90 (73%) | 77 90 (86%) | 77 90 (86%) | 77 90 (86%) | 88 90 (98%) | 90 90 (100%) |
| Internal Process | Teaching and Learning | Number of governance training hours per employee | 1x | Owen Turner | Hours | No | Increase is better | Monthly | 0 8 (0%) | 7 8 (87%) | 5 8 (62%) | 8 8 (100%) | 8 8 (100%) | 8 8 (100%) | 16 8 (200%) | 16 8 (200%) | 16 8 (200%) | 16 8 (200%) | 16 8 (200%) | 24 8 (300%) |

Business Support

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|-------------|---|---------------------------|--------|----------------|------------|------------|--------------------|-----------|------------------|-----------------|------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------|---------------|
| Customers | Measuring the training impact on the course | Customer Acquisition Rate | 1x | Alem Selimovic | Percentage | Yes | Increase is better | Monthly | 2 10 (20%) | 4 11 (36%) | 6 10 (60%) | 8 10 (80%) | 10 10 (100%) | 8 10 (80%) | 10 10 (100%) | 12 10 (120%) | 15 10 (150%) | 16 10 (160%) | - 10 (-) | - 10 (-) |
| Customers | Measuring the training impact on the course | New Customers Ratio | 1x | | Percentage | Yes | Increase is better | Monthly | 52 63 (83%) | 6 14 (43%) | 36 85 (42%) | 95 92 (103%) | 6 86 (7%) | 43 32 (134%) | 69 57 (135%) | 62 86 (65%) | 68 9 (756%) | 71 84 (85%) | - 43 (-) | - 86 (-) |

Information Technology

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 | 33 23 (143%) | 4 84 (5%) | 55 89 (62%) | 23 60 (58%) | 25 64 (59%) | 31 65 (46%) | 36 89 (40%) | 19 87 (23%) | 14 40 (35%) | 96 29 (932%) | - 91 (-) | - 92 (-) |
| People | Optimize capital & operating expenditure | OPEX budget performance | 3x | Imran Khan | % | Yes | Decrease is better | Monthly | 33 49 (83%) | 73 60 (110%) | 5 6 (0%) | 76 62 (82%) | 76 39 (60%) | 59 55 (93%) | 32 57 (159%) | 98 100 (112%) | 69 85 (125%) | 37 76 (137%) | - 33 (-) | - 39 (-) |

Operations

KPIs

KPI Lens | CEO

| Annual | Sub-team KPIs | Late KPIs | Red KPIs | Trending-down KPIs | Vertical Report | Drill-down KPIs | 9-Box | Bell-curve |

Trending-down KPIs Report (CEO - Mar - 2025)

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------------------|--|---|--------|----------------|---------------|------------|--------------------|-----------|------------------|---------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Finance | QQ | Supplier Cost Savings | 1x | Owen Turner | Currency | Yes | Increase is better | Monthly | 2 1 (200%) | 2 2 (100%) | 1 3 (33%) | 5 4 (125%) | 5 5 (100%) | 5 6 (83%) | 5 7 (71%) | 5 8 (62%) | 5 9 (56%) | 6 10 (60%) | - 11 (-) | - 12 (-) |
| Customers | Increase customer base & products and services | Offer Acceptance Rate | 1x | Hi Jones | % | Yes | Increase is better | Monthly | 11 15 (73%) | 22 15 (147%) | 1 15 (7%) | 44 16 (275%) | 44 18 (244%) | 44 20 (220%) | 44 22 (200%) | 44 22 (200%) | 44 33 (133%) | 44 33 (133%) | 44 44 (100%) | 55 55 (100%) |
| Internal Process | Build effective organization governance | Customer Lifetime Value (CLV) | 1x | Owen Turner | Currency Mill | Yes | Increase is better | Monthly | 1 1 (100%) | 500 108 (472%) | 100 110 (81%) | 111 112 (99%) | 112 115 (97%) | 111 118 (94%) | 115 120 (96%) | 130 125 (104%) | 135 130 (104%) | 140 135 (104%) | 150 140 (107%) | 160 150 (107%) |
| Internal Process | Teaching and Learning | Employee compliance rate with governance policies | 1x | Alem Selimovic | % | No | Increase is better | Monthly | 33 90 (37%) | 144 90 (160%) | 55 90 (61%) | 66 90 (73%) | 66 90 (73%) | 66 90 (73%) | 66 90 (73%) | 77 90 (86%) | 77 90 (86%) | 77 90 (86%) | 88 90 (98%) | 90 90 (100%) |
| Internal Process | Teaching and Learning | Number of governance training hours per employee | 1x | Owen Turner | Hours | No | Increase is better | Monthly | 0 8 (0%) | 7 8 (87%) | 5 8 (62%) | 8 8 (100%) | 8 8 (100%) | 8 8 (100%) | 16 8 (200%) | 16 8 (200%) | 16 8 (200%) | 16 8 (200%) | 16 8 (200%) | 24 8 (300%) |

Business Support

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|-------------|--|---------------------|--------|----------------|------|------------|--------------------|-----------|-------------------|------------------|------------------|------------------|----------------|-------------------|-----------------|------------------|-------------------|------------------|---------------|---------------|
| Customers | Increase annual bonuses by 90% for 10% of sector employees | Revenue Growth Rate | 1x | Alem Selimovic | % | No | Increase is better | Monthly | 91 51 (178%) | 77 9 (189%) | 73 87 (84%) | 40 68 (59%) | 3 43 (7%) | 59 57 (104%) | 71 77 (9%) | 13 83 (16%) | 91 36 (253%) | 48 65 (74%) | - 67 (-) | - 38 (-) |

Information Technology

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------------------|--|--|--------|------------|------|------------|--------------------|-----------|-------------------|-------------------|------------------|------------------|------------------|-------------------|-------------------|--------------------|-------------------|-------------------|---------------|---------------|
| Internal Process | Improve & automate efficient processes | % of IT Service tickets closed on time | 1x | Imran Khan | % | Yes | Increase is better | Monthly | 91 51 (178%) | 77 9 (189%) | 73 87 (84%) | 40 68 (59%) | 3 43 (7%) | 59 57 (104%) | 71 77 (9%) | 13 83 (16%) | 91 36 (253%) | 48 65 (74%) | - 67 (-) | - 38 (-) |
| People | Optimize capital & operating expenditure | OPEX budget performance | 3x | Imran Khan | % | Yes | Decrease is better | Monthly | 59 49 (83%) | 73 60 (110%) | 5 6 (0%) | 76 62 (82%) | 76 37 (40%) | 59 55 (93%) | 32 57 (159%) | 98 100 (112%) | 69 85 (125%) | 37 76 (137%) | - 33 (-) | - 39 (-) |

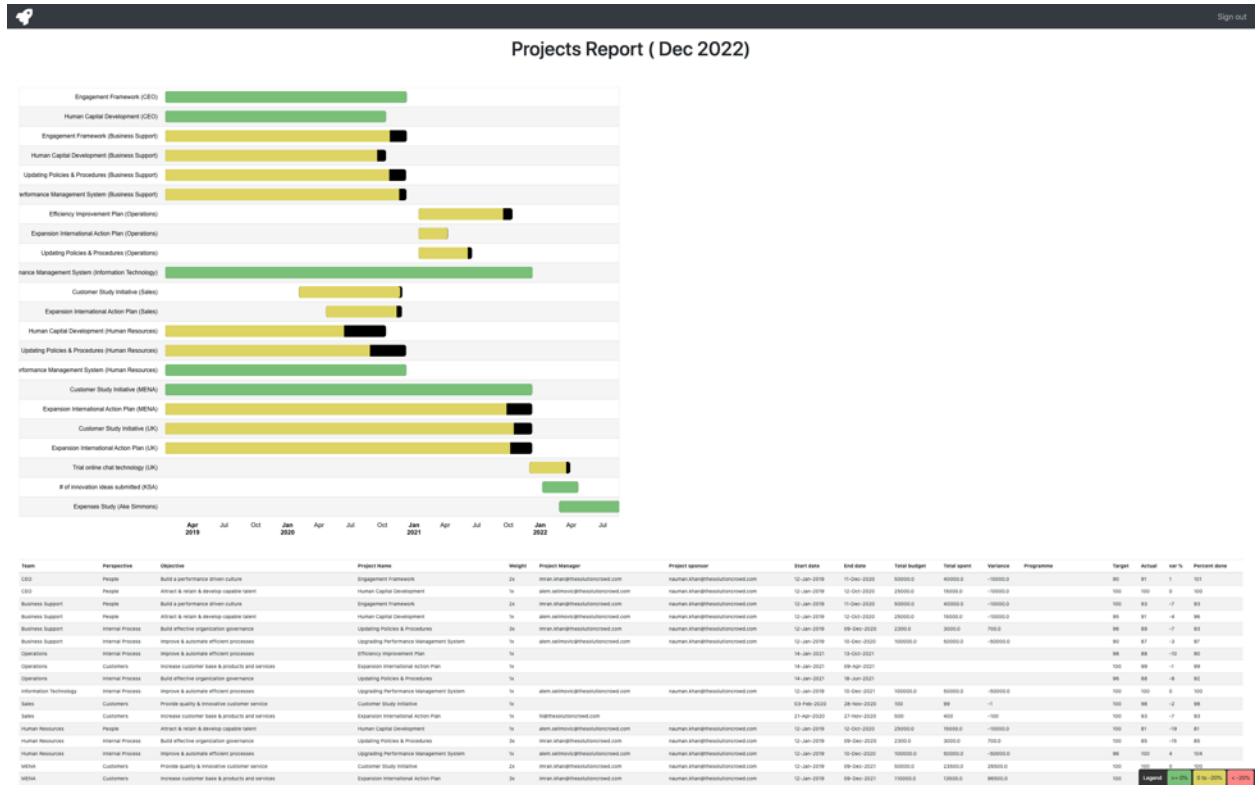
Operations

KPIs

| Perspective | Objective | KPI Name | Weight | Owner | Unit | Cumulative | Direction | Frequency | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|------------------|--|--------------------------------------|--------|----------------|------|------------|--------------------|-----------|-------------------|--------------------|------------------|------------------|--------------------|-------------------|-------------------|------------------|-------------------|-------------------|-------------------|-------------------|
| Internal Process | Build effective organization governance | Timely closure of audit observations | 1x | Alem Selimovic | % | Yes | Increase is better | Monthly | 98 24 (408%) | 45 42 (107%) | 18 83 (19%) | 41 70 (59%) | 60 26 (231%) | 87 82 (106%) | 36 9 (400%) | 8 0 (100%) | 84 68 (124%) | 14 23 (61%) | 19 82 (21%) | 79 83 (95%) |
| | Build a performance driven culture | Average employee satisfaction rating | 1x | Sari Kana | % | Yes | Increase is better | Monthly | 30 96 (31%) | 74 54 (137%) | 57 83 (69%) | 40 87 (41%) | 100 70 (143%) | 62 50 (124%) | 95 40 (237%) | 88 0 (100%) | 92 68 (135%) | 39 24 (162%) | 31 37 (84%) | 96 8 (1200%) |
| People | Optimize capital & operating expenditure | EBITDA budget performance | 1x | Hi Jones | % | Yes | Increase is better | Monthly | 33 90 (37%) | 144 90 (160%) | 55 90 (61%) | 66 90 (73%) | 66 90 (73%) | 66 90 (73%) | 77 90 (86%) | 77 90 (86%) | 77 90 (86%) | 88 90 (98%) | 90 90 (100%) | |



Projects report

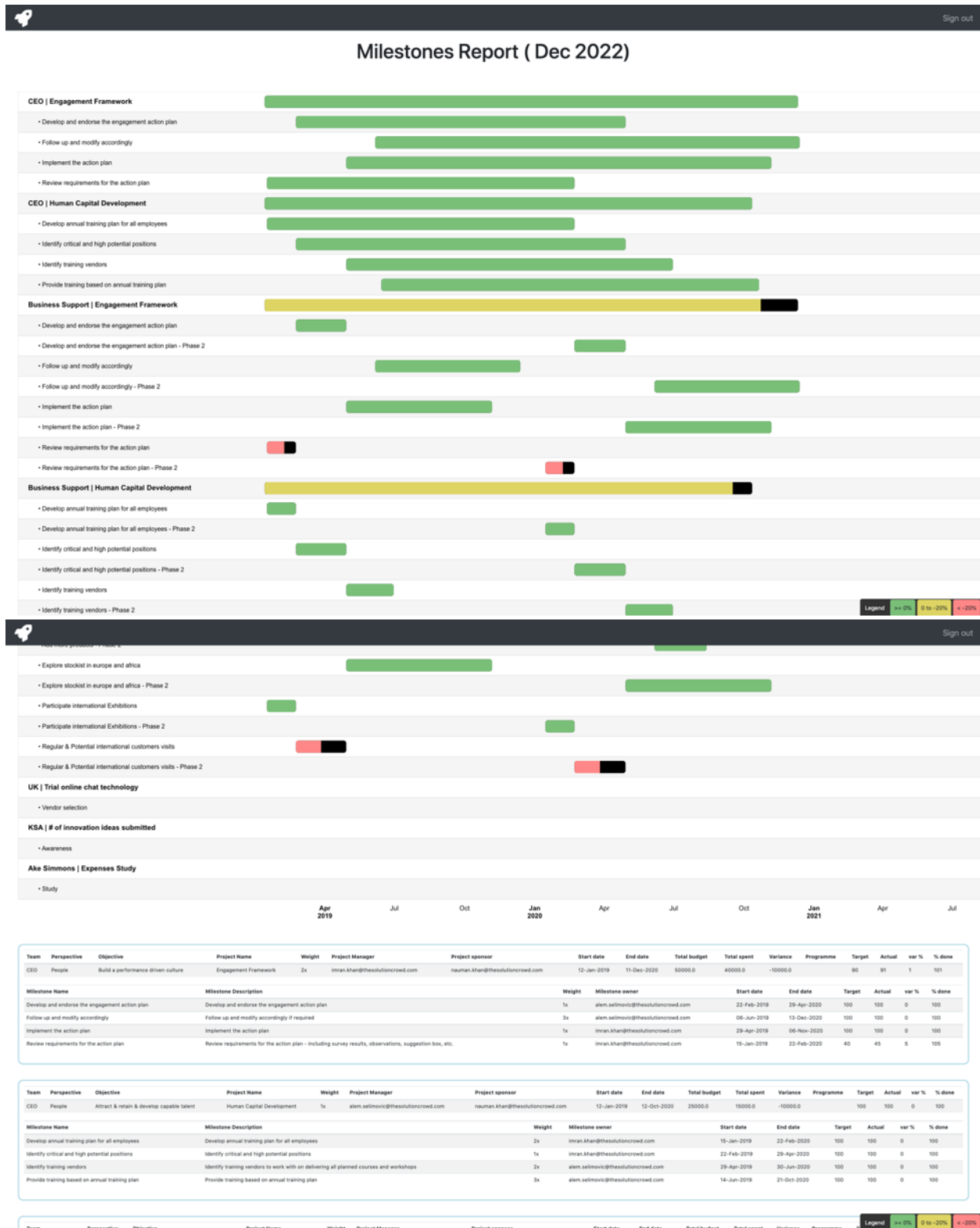


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Milestones Report





Users reports

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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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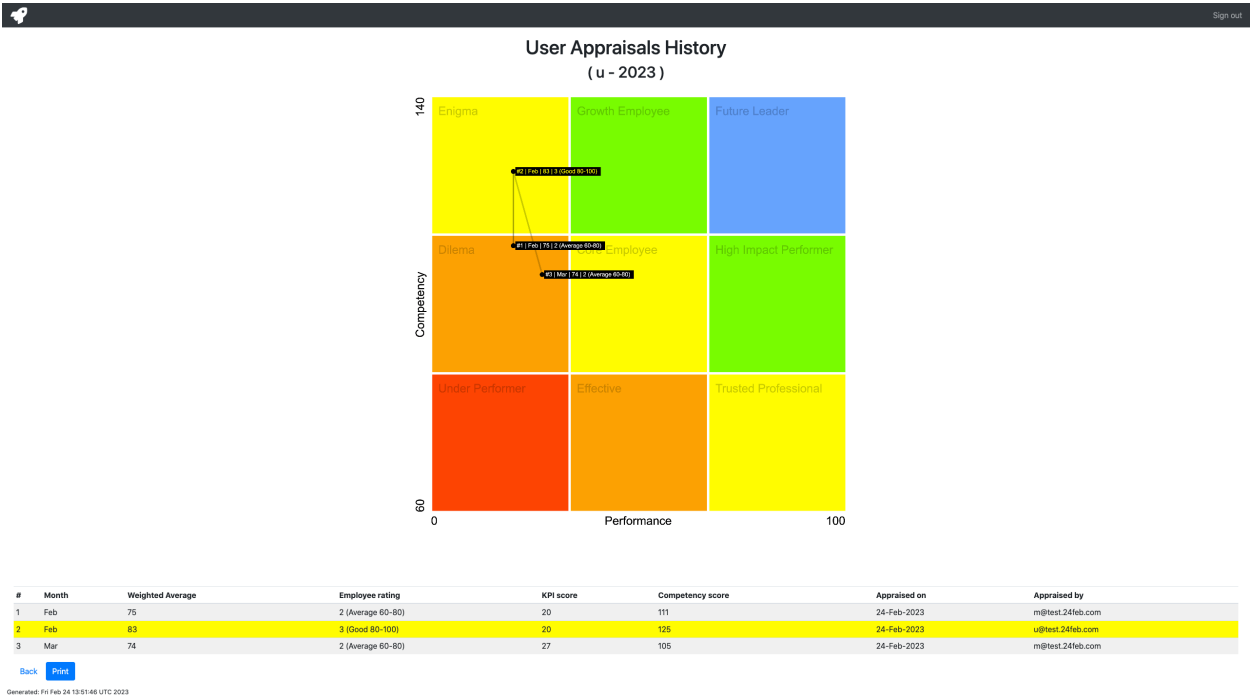
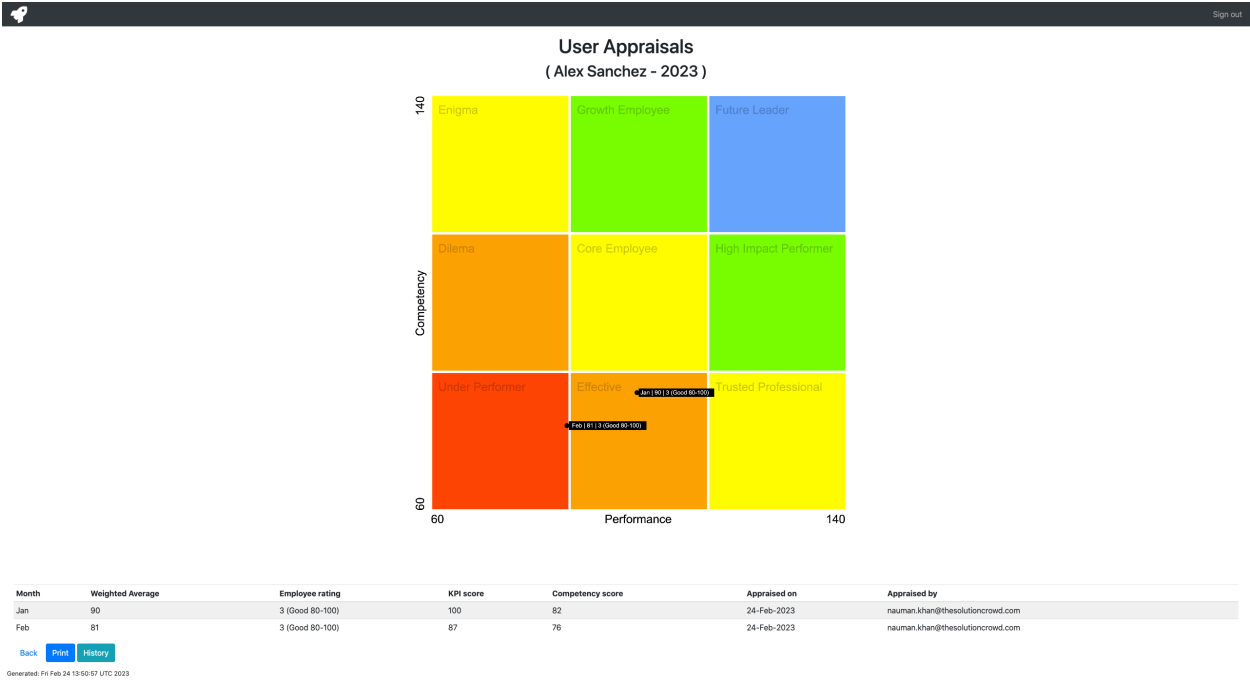
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User Report

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 |

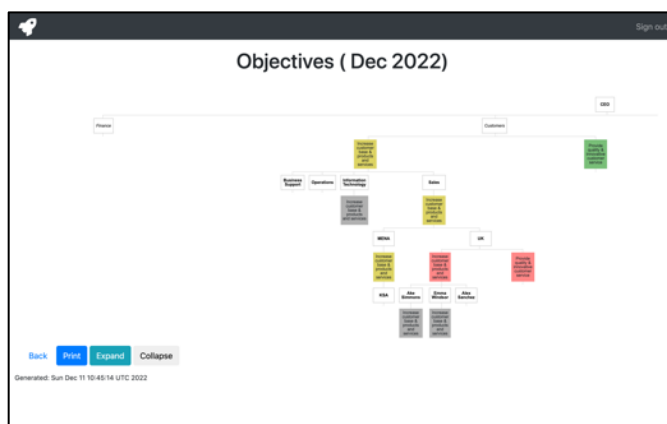
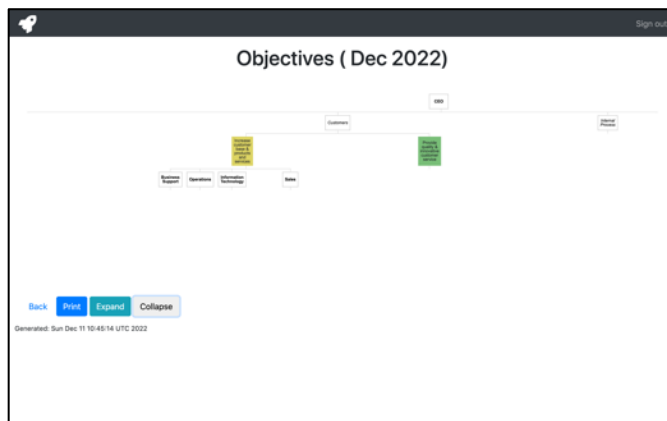
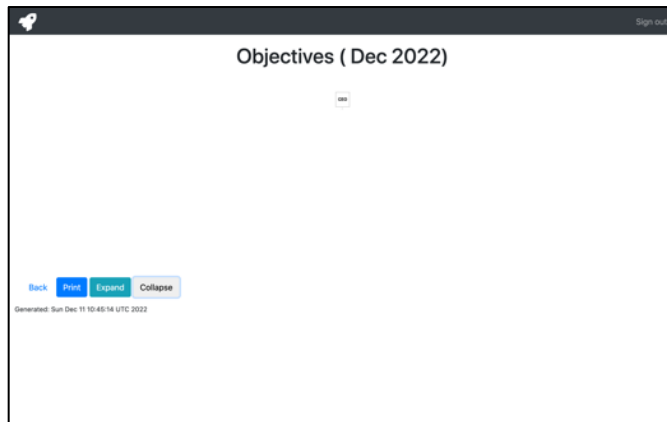




Objectives



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





Org reports

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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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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 Etihad (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.



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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 7 (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 Bowli | 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%) | - 10 (-) | 5 10 (50%) | 6 10 (60%) | 6 10 (60%) | 6 10 (60%) | 6 15 (40%) | 8 15 (53%) | 10 15 (67%) | 10 15 (67%) |
| Customers | Increase customer base & products | Awareness has | 1x | Sari Kana | new | Yes | Increase is better | Quarterly | - - (-) | - - (-) | 60 80 (-) | - - (-) | - - (-) | 65 90 (-) | - - (-) | - - (-) | 70 95 (-) | - - (-) | - - (-) | 75 100 (-) |



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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%) |
| 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 (50%) | 0 / 50 (65%) | 25 / 60 (80%) | 50 / 70 (80%) | 60 / 80 (80%) | 70 / 90 (80%) | 90 / 95 (95%) | 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 | | | | | | | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Develop annual training plan for all employees | | | | | | | | 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%) |
| Identify critical and high potential positions | | | | | | | | 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%) |
| Identify training vendors | | | | | | | | 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%) |
| Provide training based on annual training plan | | | | | | | | 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%) |



Sign out

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 |
|------|-------------|--|-----------------------------|--------|----------------|------------|--------------------|-----------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| 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%) |
| 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) |
| 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) |
| 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%) | 70 / 60 (117%) |
| 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) |
| | | Build | Timely | | | | | | | | | | | | | | | | |



Talent reports

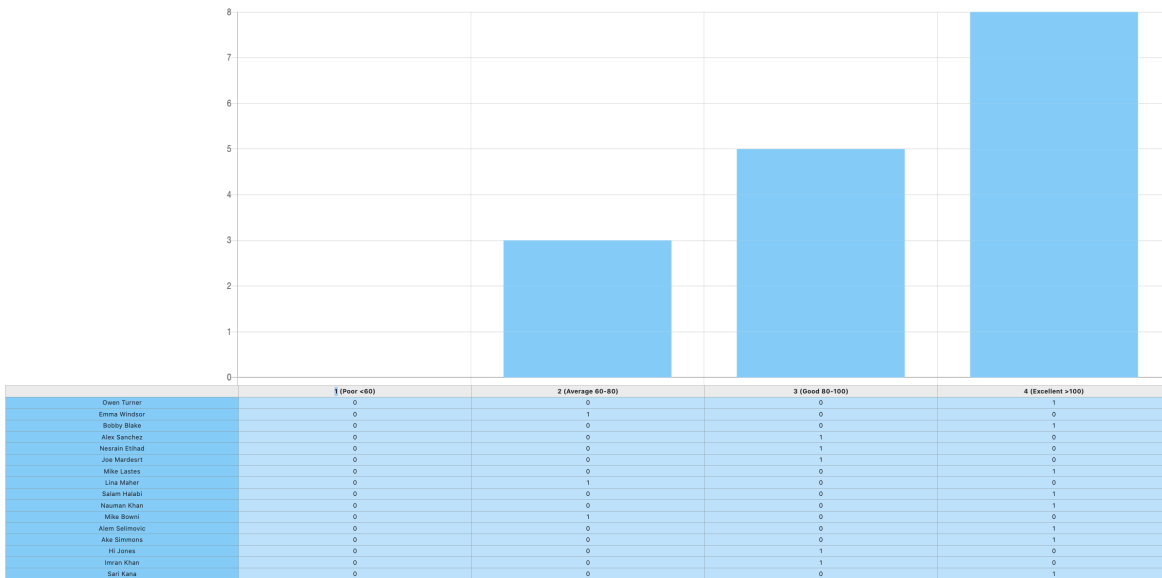
See talent grouped by ratings – all fully configurable.



Sign out

Talent report (Feb 2023)

By user



By various dimensions.

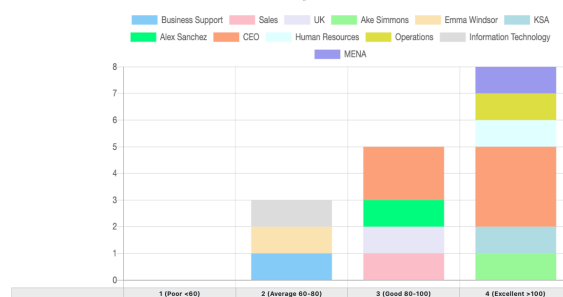


Sign out

By manager



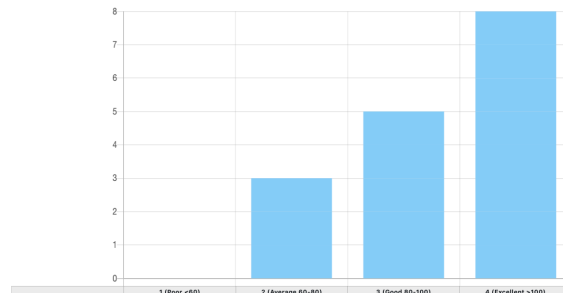
By team



By grade



By designation





Bell-curves

See appraisals grouped on bell-curves.

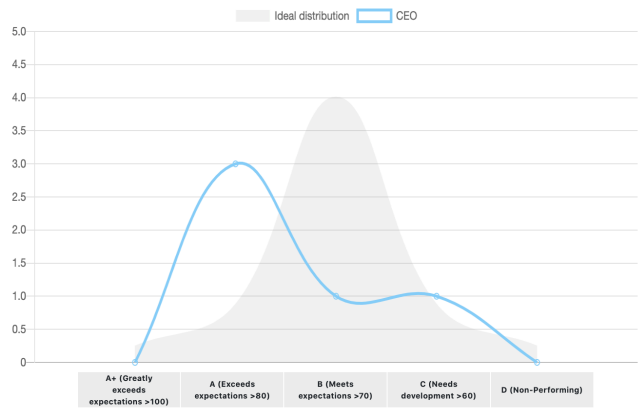
KPI Lens | CEO

X

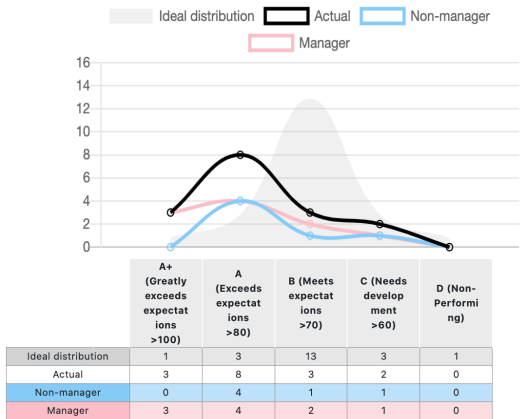
| Annual | Sub-team KPIs | Drill-down KPIs | 9-Box | Bell-curve |

Bell-curve report (Aug 2023)

For team CEO only



By manager / non-manager Subteams of CEO

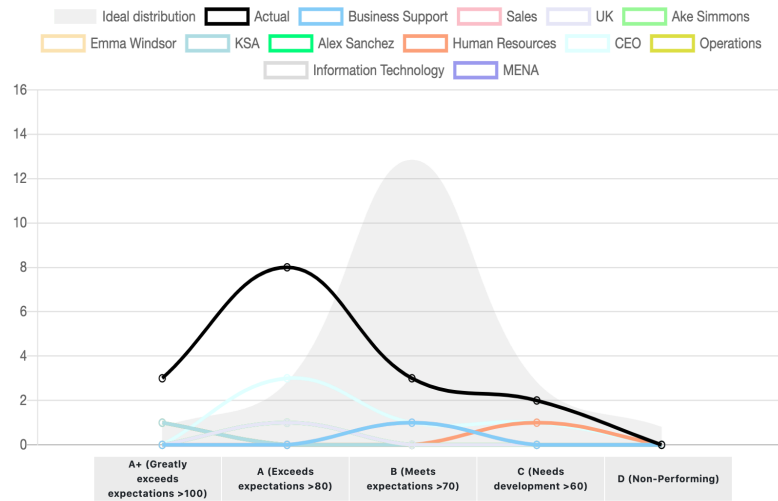


By grade Subteams of CEO

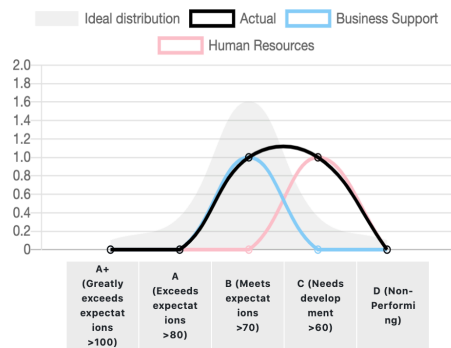




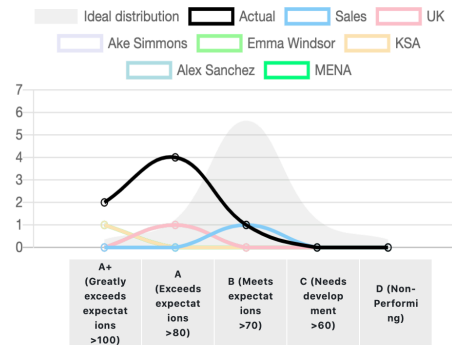
Subteams of CEO (Level 1)



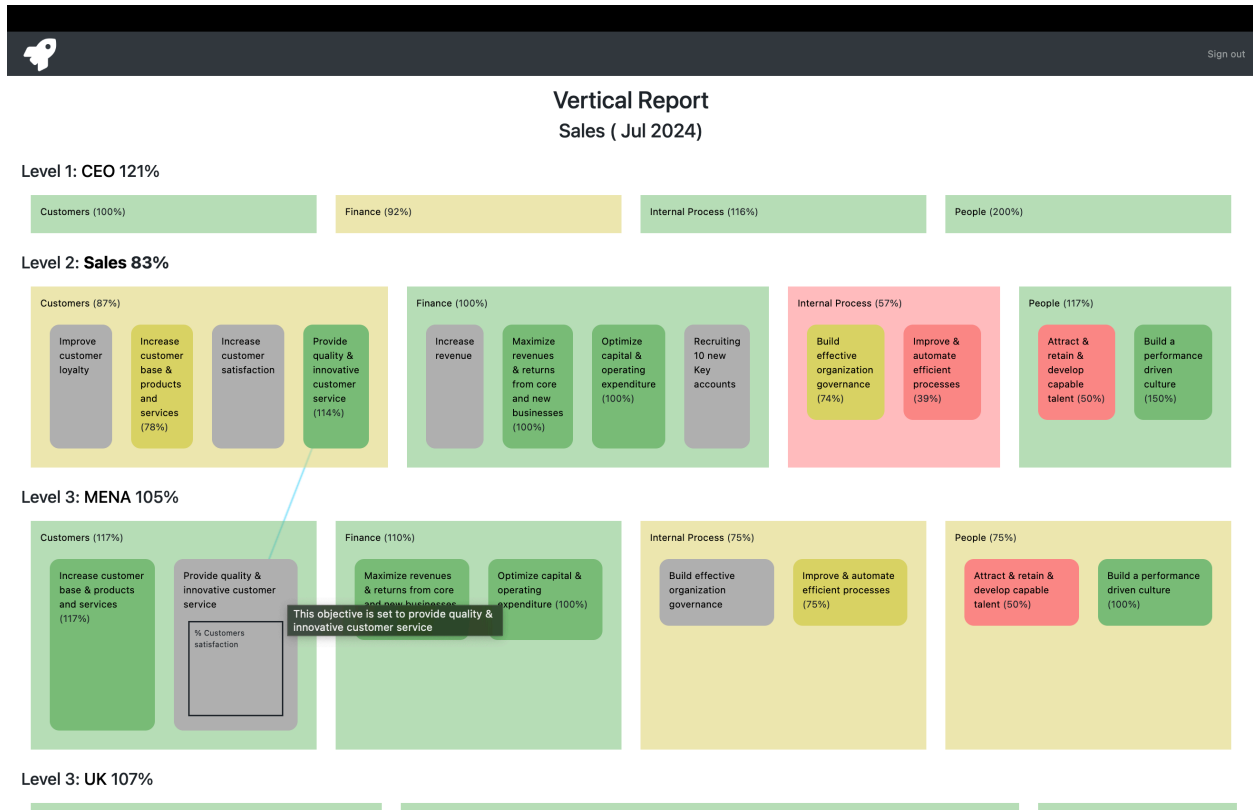
Subteams of Business Support (Level 2)



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).



Scheduled reports

Profile details

Name
Owen Turner

Grade
Executive

Designation
Founder

Tree Depth
One level down

Email Bulk Report (days of the month)
Nothing selected

Email Bulk Report (days of week)
Monday, Thursday

Email Previous Bulk Report (days of the month)
7

Email Bulk Report (include)
KPI reports, Drill down reports, Project reports, HR reports

Silent mode? ☐

[EDIT PROFILE](#) [SEND BULK REPORT NOW](#)

Have the system email you all your selected reports on your selected schedule (e.g. every Monday, every 1st and 7th of the month, etc.) or sent immediately. Including reports for the previous month and factoring in user's Tree Depth.

Bulk report

support@kippy.me <support@kippy.me> Today at 11:09

To: [Redacted]

| | | | | |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| Org report.pdf 7.6 KB | Detailed Users Repo... 15.4 KB | Sub-team KPIs.pdf 70.4 KB | Late KPIs.pdf 12.9 KB | Red KPIs.pdf 36.4 KB |
| Drill-down KPIs - Ob... 20.3 KB | Drill-down KPIs - Ob... 12.9 KB | Drill-down KPIs - Ob... 13 KB | Drill-down KPIs - Ob... 13.1 KB | Drill-down KPIs - Ob... 16.6 KB |
| Drill-down KPIs - Ob... 16.8 KB | Drill-down KPIs - Ob... 24.4 KB | Drill-down KPIs - Ob... 12.9 KB | Projects.pdf 2.4 KB | Sub-team Projects.pdf 83.4 KB |
| Milestones.pdf 1.5 KB | HR Report.pdf 14 KB | Last Appraisals.pdf 6.5 KB | Risk Report.pdf 9.2 KB | |

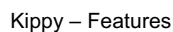
[Download All](#) [Preview All](#)

Hi Owen Turner

Please find attached your bulk report.

Have a great day!

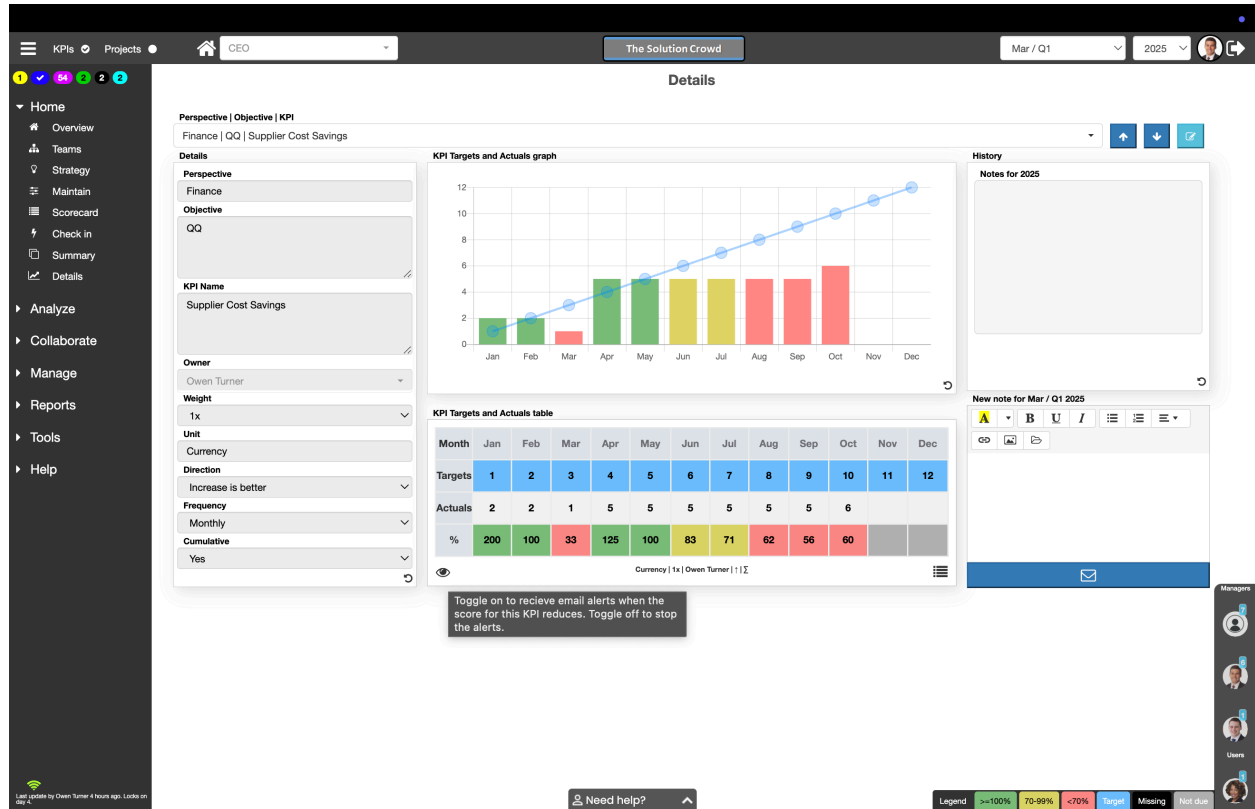
kippy
performance management ... made simple



95

Watch List

Click eye-icon on each KPI/KR to add it to your watch list.



You will be emailed if the KPI/KR reduces in score.



Watch list

S

support@kippy.me <support@kippy.me>

To: nmannkhan@gmail.com

Today at 11:27

Watch List

The scores for the following KPIs has decreased

| Team | KPI | Previous Score | Current Score | Score Difference |
|------|--|----------------|---------------|------------------|
| CEO | Number of governance training hours per employee | 87% | 62% | -25 |

Log in

If you need more help, email us at support@kippy.me

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




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.



Sign out

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) |

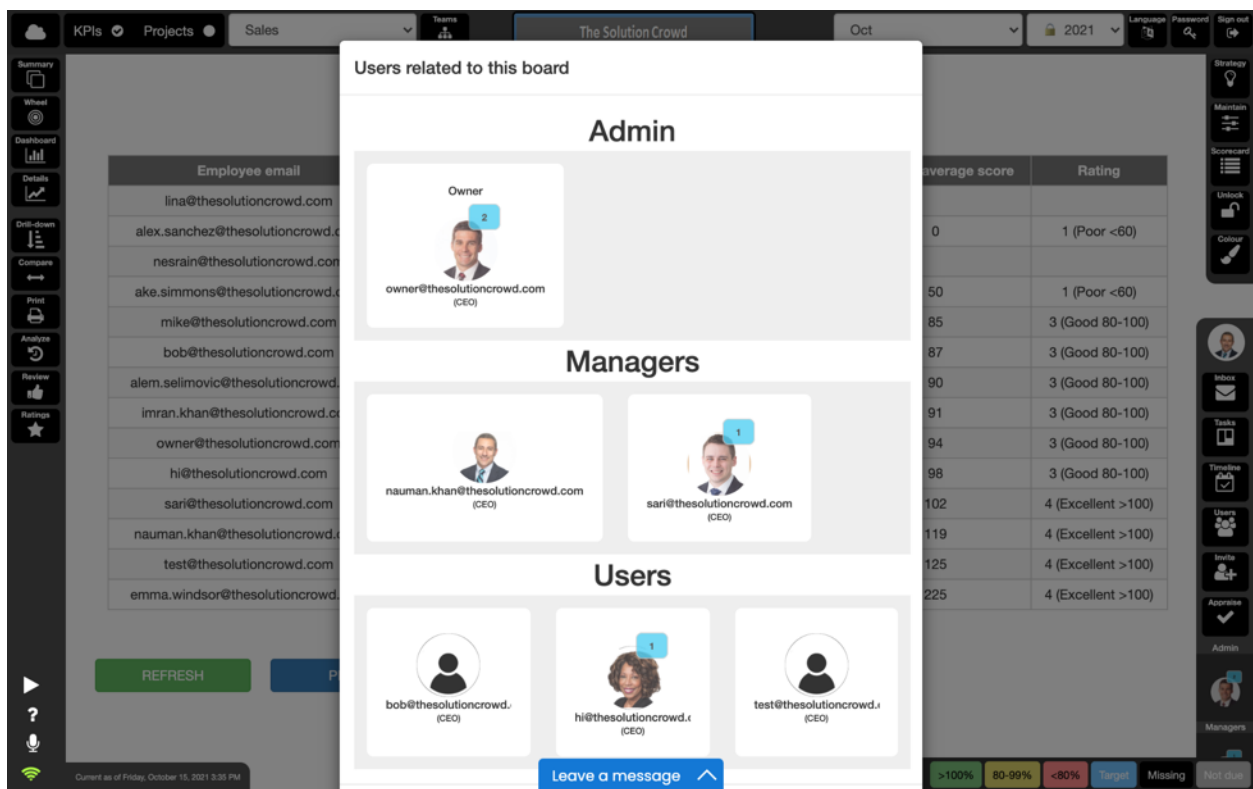
Generated: Mon Jun 20 10:33:12 UTC 2022

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.



The screenshot displays the Kippy dashboard interface. A modal window titled "Users related to this board" is open, showing a list of users categorized by role: Admin, Managers, and Users. The background dashboard shows a table of employee emails and a sidebar with navigation options.

Users related to this board

Admin

- Owner: owner@thesolutioncrowd.com (CEO)

Managers

- nauman.khan@thesolutioncrowd.com (CEO)
- sari@thesolutioncrowd.com (CEO)

Users

- bob@thesolutioncrowd.com (CEO)
- hi@thesolutioncrowd.com (CEO)
- test@thesolutioncrowd.com (CEO)

Buttons: REFRESH, Leave a message

Managers have additional screen to perform HR functions.

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

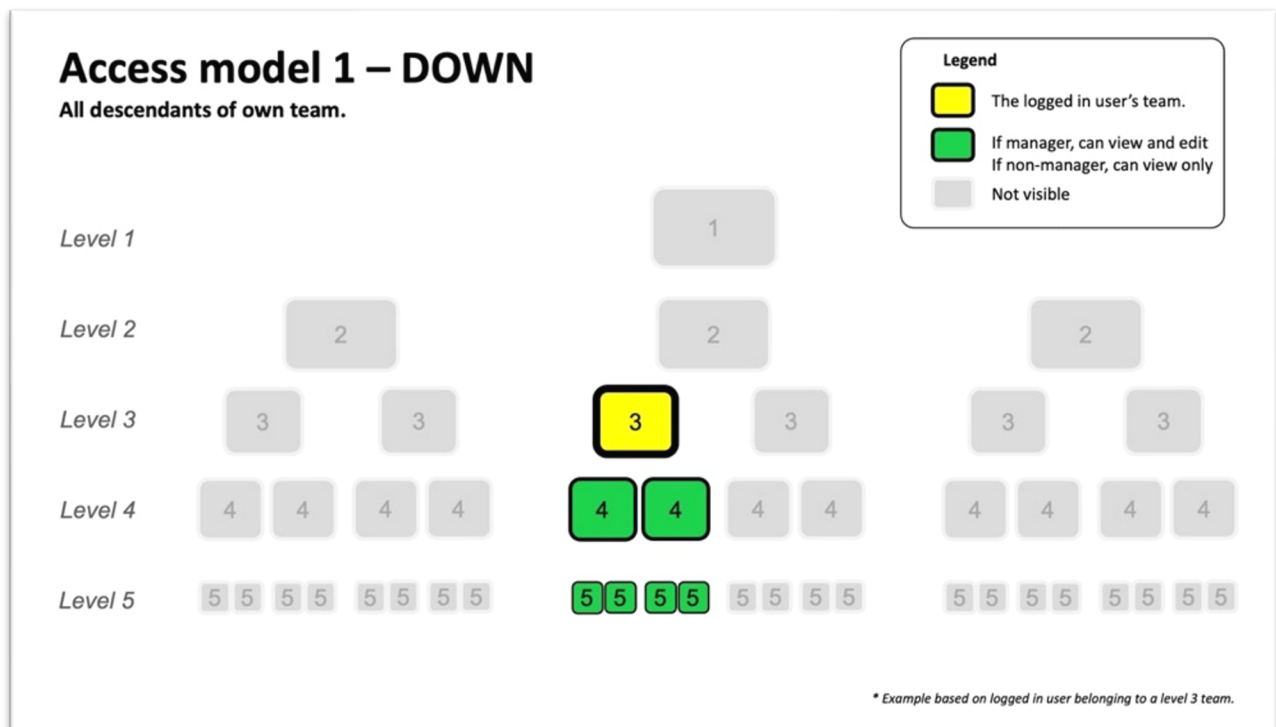
Team visibility model

Access mode

DOWN: All descendants of own team.

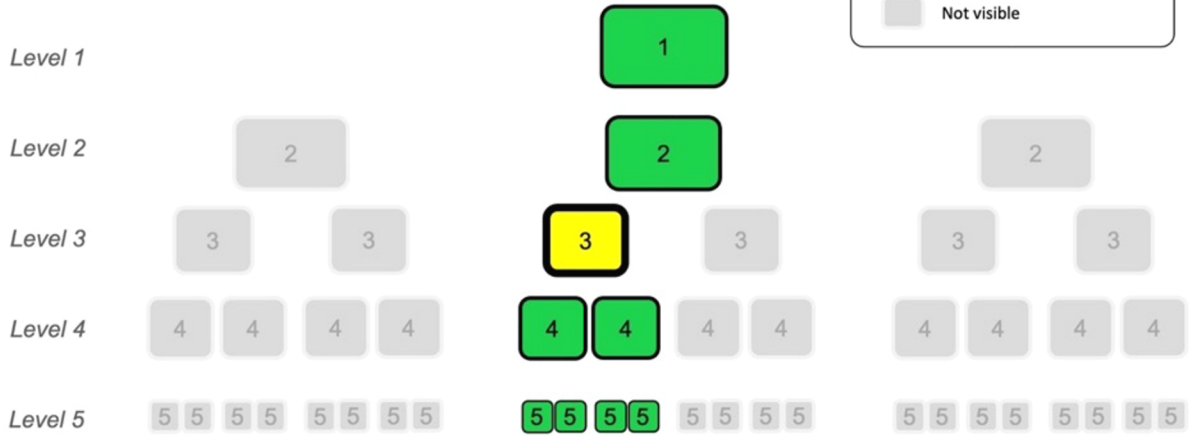
SAVE ACCESS MODE

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



Access model 2 – UP-DOWN

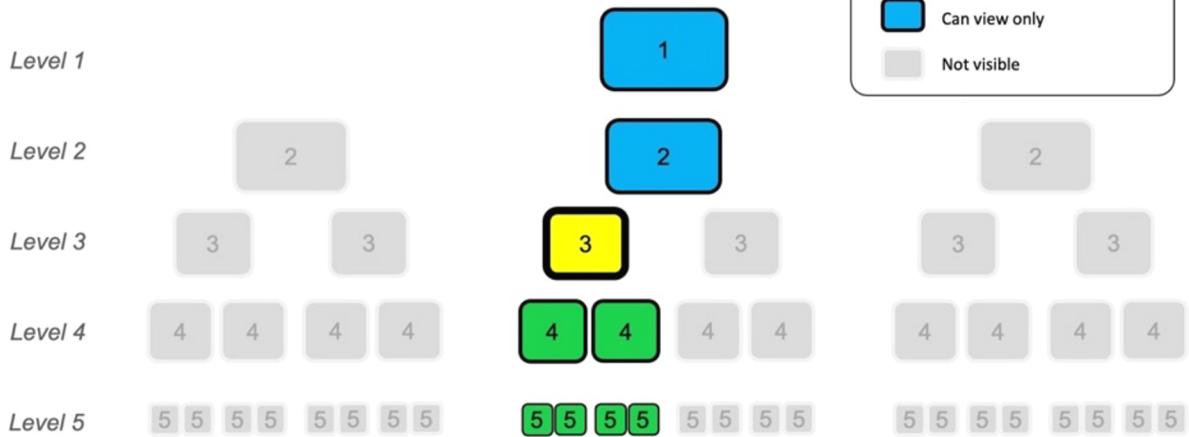
All descendants of own team. Plus, direct ancestors of own team, and managers can edit those ancestors.



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

Access model 3 – UP-DOWN RESTRICTED

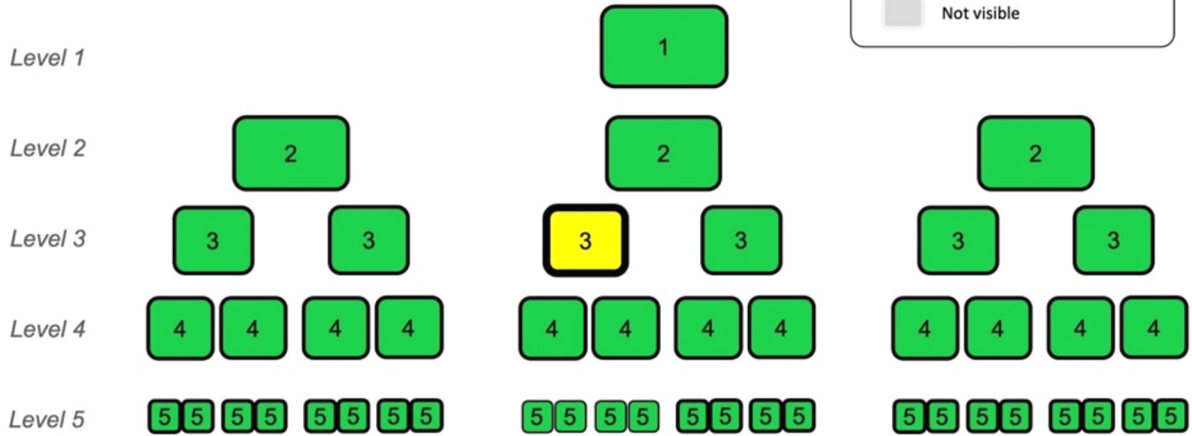
All descendants of own team. Plus, direct ancestors of own team, but managers can not edit those ancestors.



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

Access model 4 – FULL

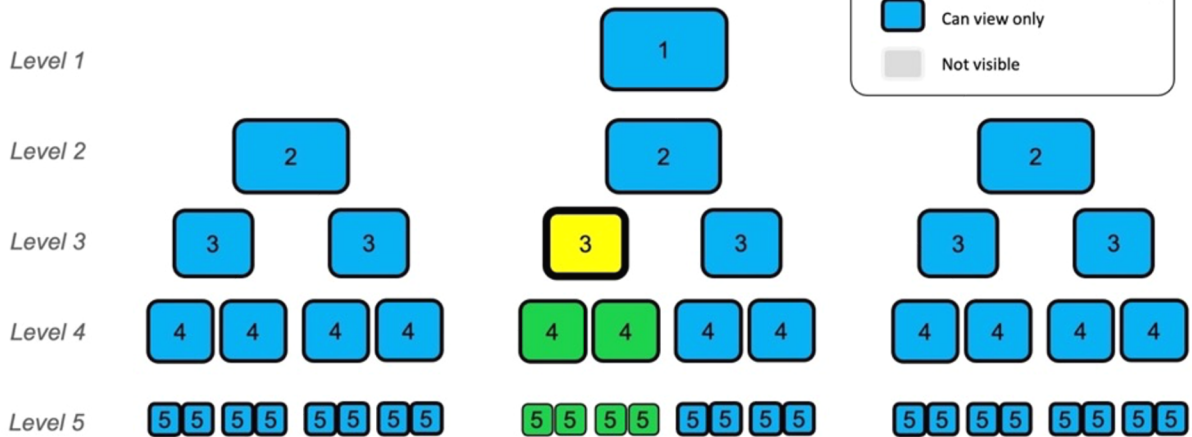
All teams, anywhere in the organisation. Managers can edit any team.



* 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.

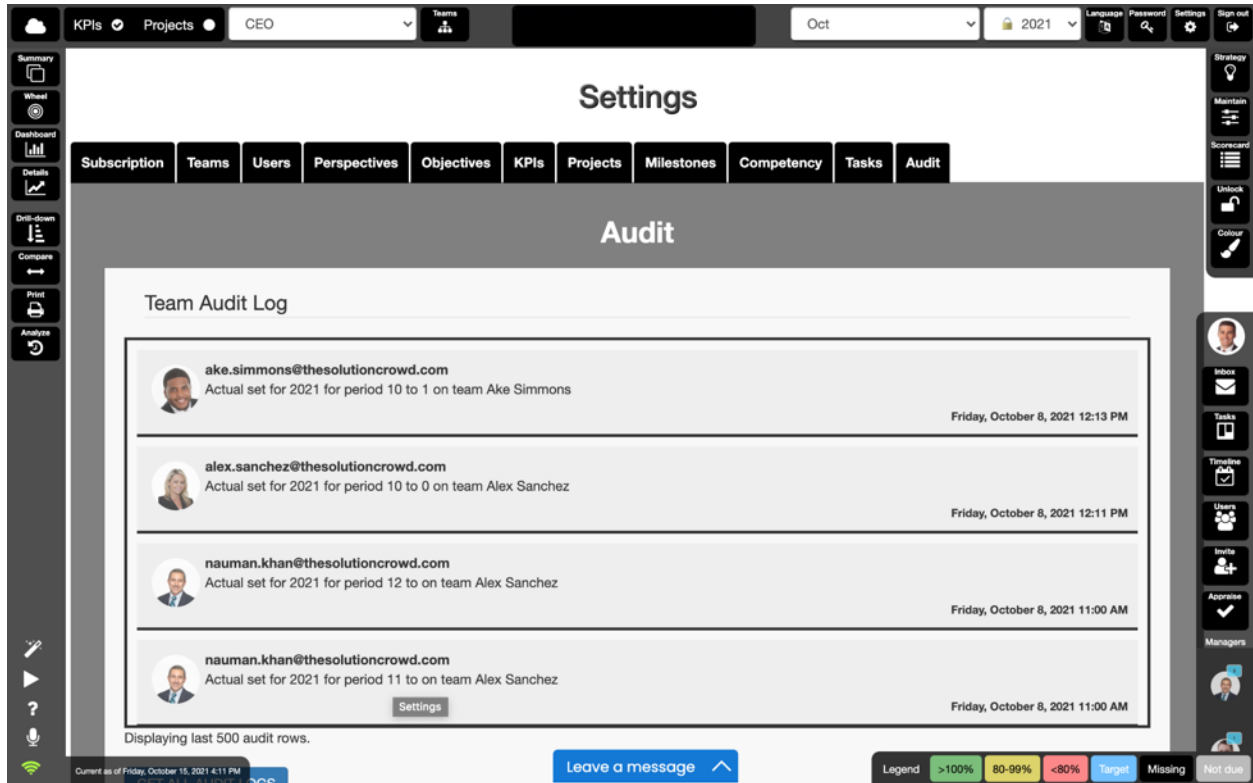


* Example based on logged in user belonging to a level 3 team.

Auditing

Every change is automatically audited in an immutable log.

System owners can review the system-wide audit log.

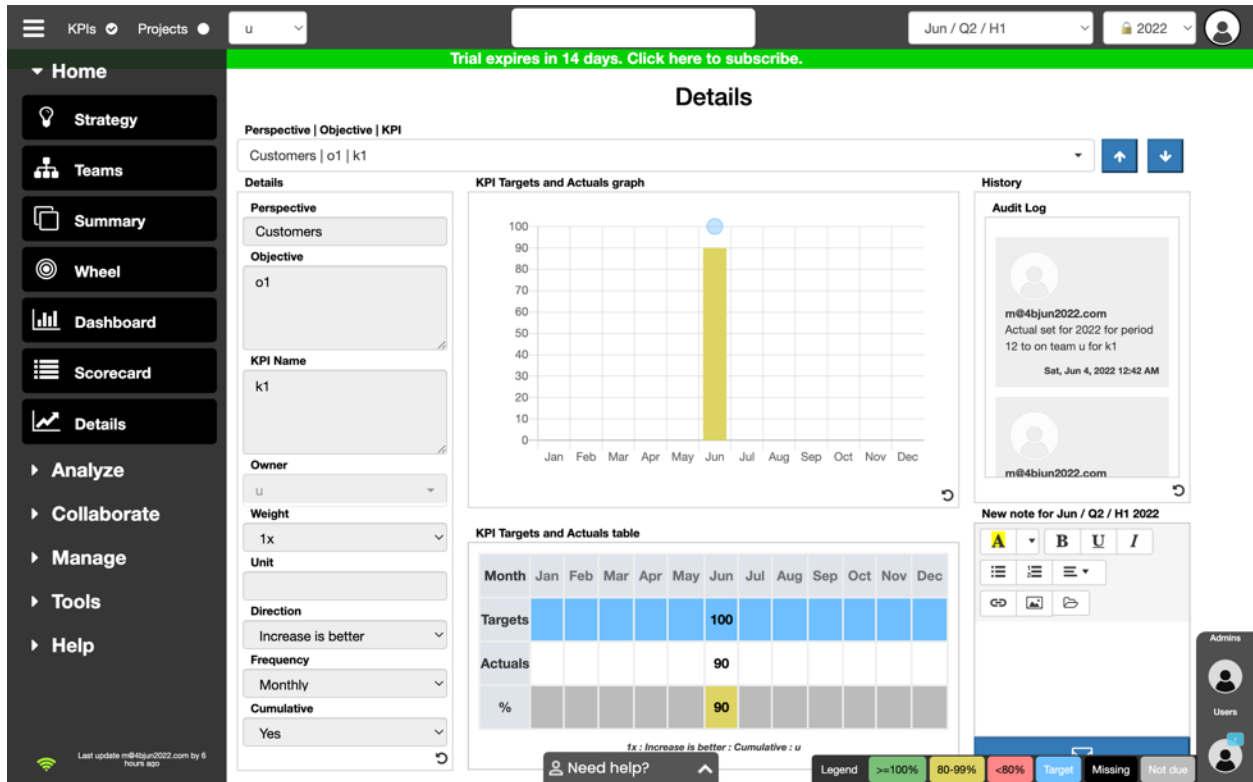


The screenshot shows the Kippy application interface. At the top, there's a navigation bar with 'KPIs', 'Projects', and a 'CEO' dropdown. Below this is a 'Settings' section with tabs for 'Subscription', 'Teams', 'Users', 'Perspectives', 'Objectives', 'KPIs', 'Projects', 'Milestones', 'Competency', 'Tasks', and 'Audit'. The 'Audit' tab is selected, showing a 'Team Audit Log'. The log contains four entries, each with a user profile, email, action description, and timestamp. The entries are for Ake Simmons, Alex Sanchez, and Nauman Khan. The interface also includes a left sidebar with navigation icons and a right sidebar with additional icons. At the bottom, there's a status bar with a timestamp, a 'Leave a message' button, and a legend for performance metrics.

| 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 |

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.



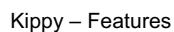


History

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.



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



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

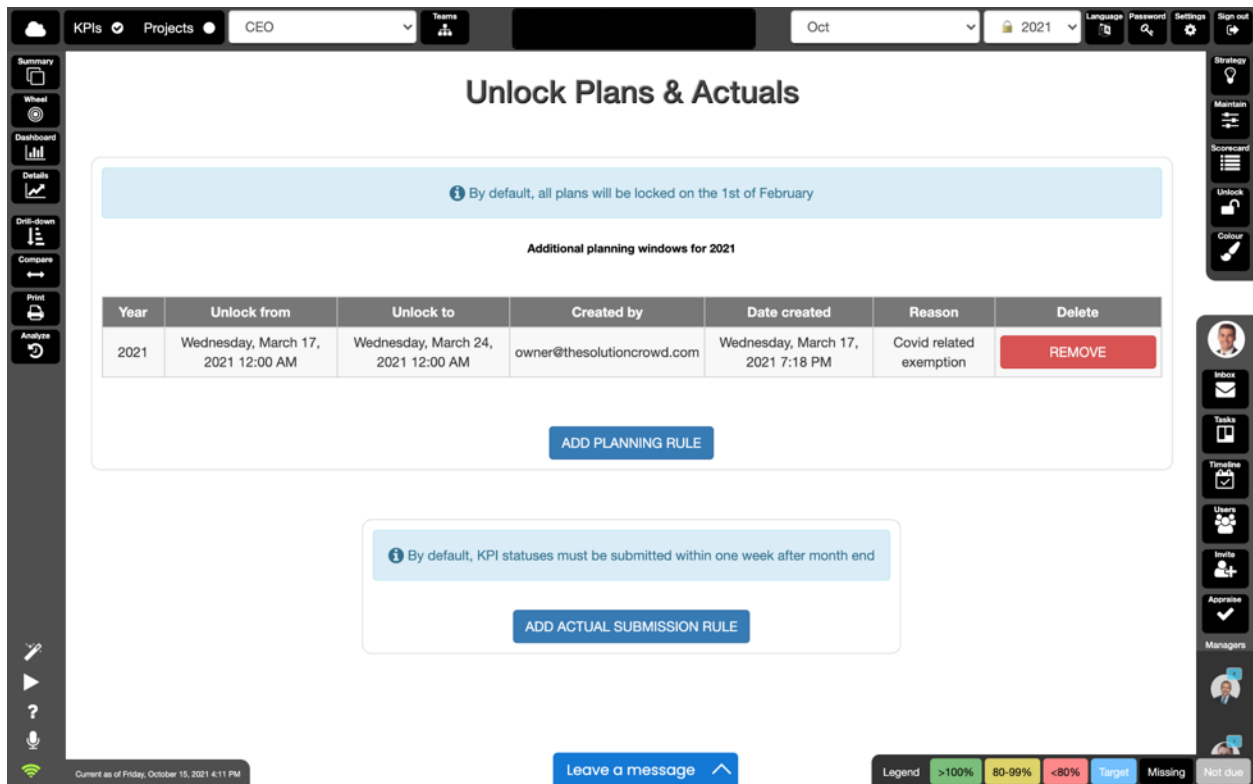
User's Audit Report for Hi Jones (hi@thesolutioncrowd.com) (Feb 2024)

| 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

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



Unlock Plans & Actuals

By default, all plans will be locked on the 1st of February

Additional planning windows for 2021

| Year | Unlock from | Unlock to | Created by | Date created | Reason | Delete |
|------|------------------------------------|------------------------------------|----------------------------|-----------------------------------|-------------------------|--------|
| 2021 | Wednesday, March 17, 2021 12:00 AM | Wednesday, March 24, 2021 12:00 AM | owner@thesolutioncrowd.com | Wednesday, March 17, 2021 7:18 PM | Covid related exemption | REMOVE |

ADD PLANNING RULE

By default, KPI statuses must be submitted within one week after month end

ADD ACTUAL SUBMISSION RULE

Leave a message

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



The screenshot shows the Kippy dashboard interface. At the top, there's a navigation bar with tabs for KPIs, Projects, and CEO. A modal titled "Add actual submission rule" is open in the center. It contains two input fields: "Range" with the value "Fri, October 15, 2021 @ 00:00 - Fri, October 22, 2021 @ 00:00" and "Reason" which is empty. Below these fields are two buttons: "CANCEL" and "ADD ACTUAL SUBMISSION RULE".

In the background, a table is visible with the following data:

| Year | Unlock from | Unlock to | Created by | Date created | Reason | Delete |
|------|------------------------------------|------------------------------------|----------------------------|-----------------------------------|-------------------------|--------|
| 2021 | Wednesday, March 17, 2021 12:00 AM | Wednesday, March 24, 2021 12:00 AM | owner@thesolutioncrowd.com | Wednesday, March 17, 2021 7:18 PM | Covid related exemption | REMOVE |

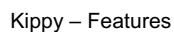
Below the table is a button labeled "ADD PLANNING RULE". Further down, a message box states: "By default, KPI statuses must be submitted within one week after month end". Below this message is another button labeled "ADD ACTUAL SUBMISSION RULE".

At the bottom of the dashboard, there's a "Leave a message" button and a legend with color-coded boxes for ">100%", "80-99%", "<80%", "Target", "Missing", and "Not due".

Period Lock Days

Number of days after month-end

SAVE PERIOD LOCK DAYS



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

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?



KIPs

Projects

CEO

The Solution Crowd

Feb

2024

Home

Analyze

Collaborate

Reports

Tools

Help

37 unapproved KIPs

2 self-appraisals to review

Settings

Setup

Config

Subscription

Teams

Users

Perspectives

Objectives

KPI

Projects

Milestones

Competency

Tasks

Audit

Integrations

Reports

Setup

Import team

Download the kippy template, populate it with all the data for this team and upload it all in one go.

Please upload a kippy template

Choose file

No file chosen

UPLOAD

Set up mode

Unlock all planning and actual submissions

OFF

Show quickset up for managers

ON

Need help?

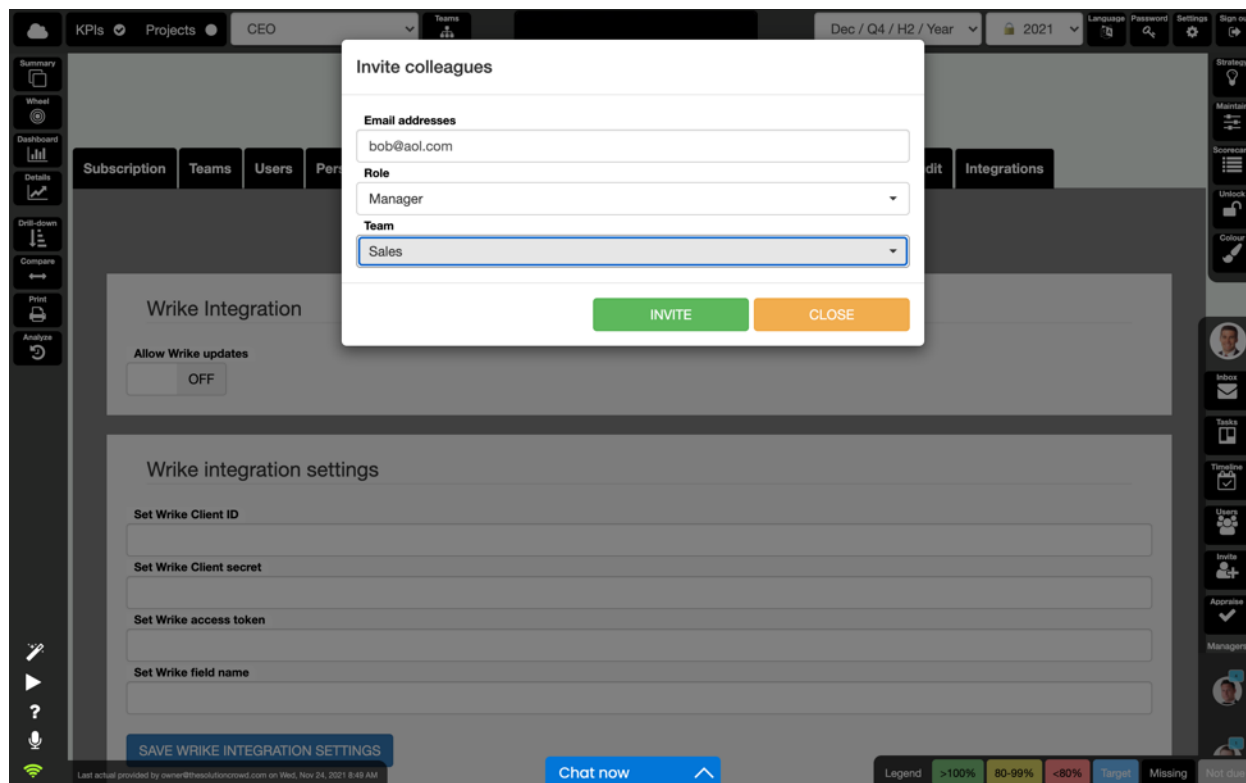
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User management

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.



 Sign out

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

▼ Home

💡 Strategy

👤 Teams

📄 Summary

🎯 Wheel

📊 Dashboard

📋 Scorecard

📈 Details

⚙️ Maintain

▶ Analyze

▶ Collaborate

▶ Reports

▶ Tools

▶ Help

Last update Nauman Khan by 13 days ago

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

Legend

>=100%

80-99%

<80%

Target

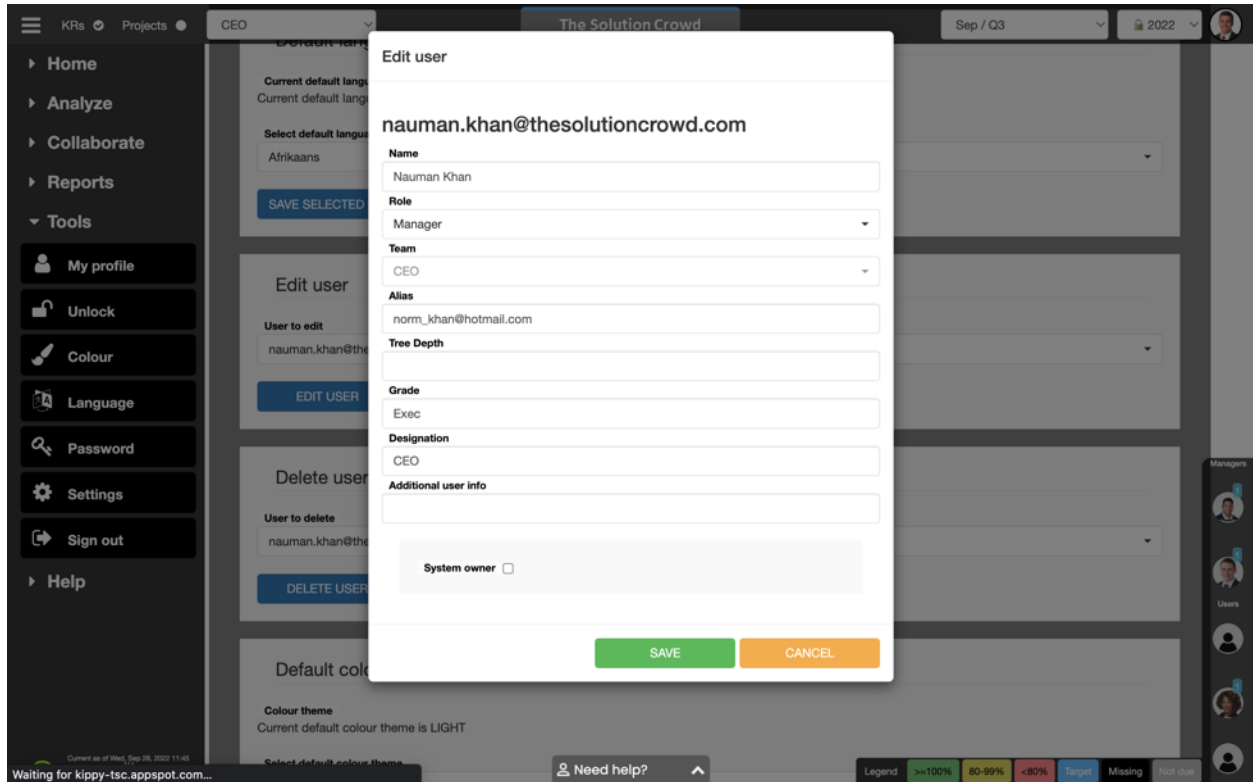
Missing

Not due

Managers

Users

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
Reminder
To: nauman.khan@thesolutioncrowd.com

2 October 2021 at 13:02

S

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

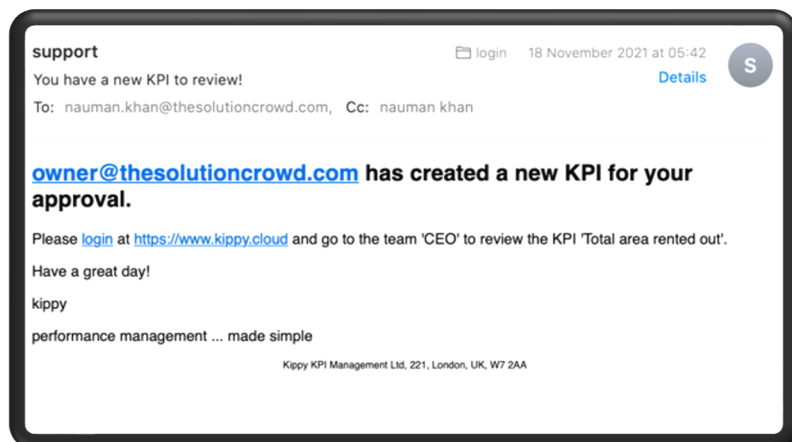
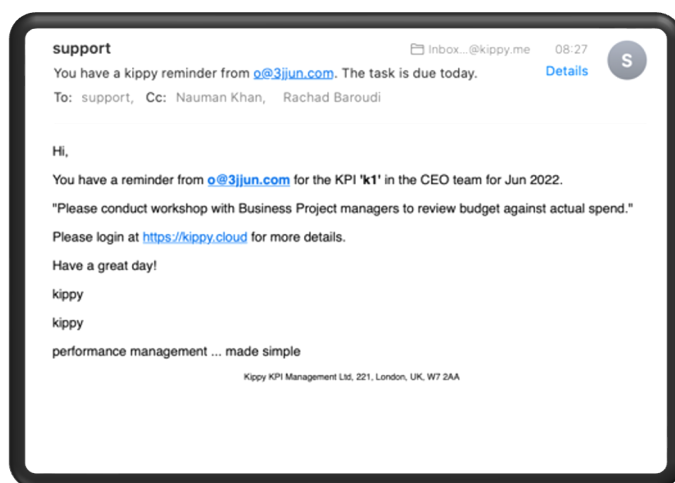
Click here to [unsubscribe](#) from these emails.

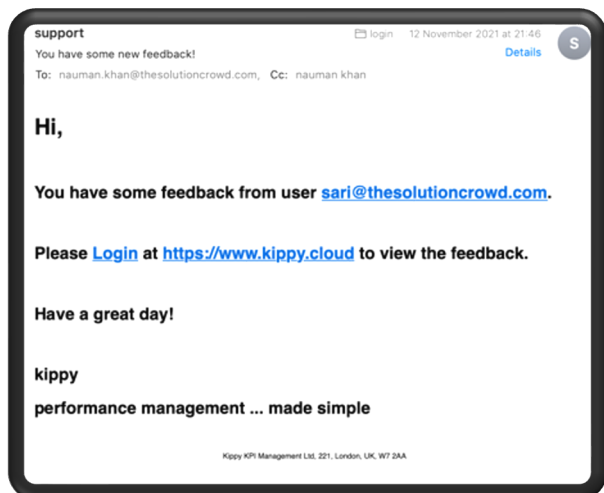
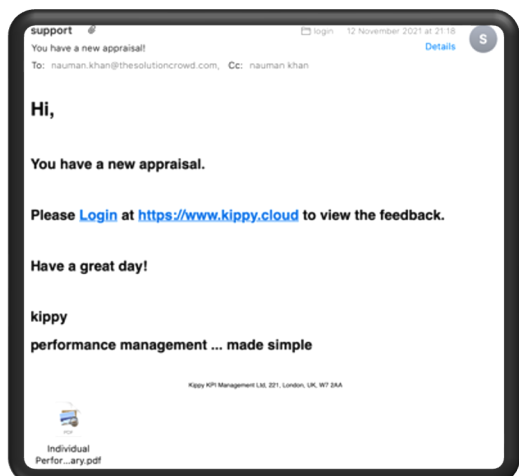
Kippy KPI Management Ltd, 221, London, UK, W7 5AA

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

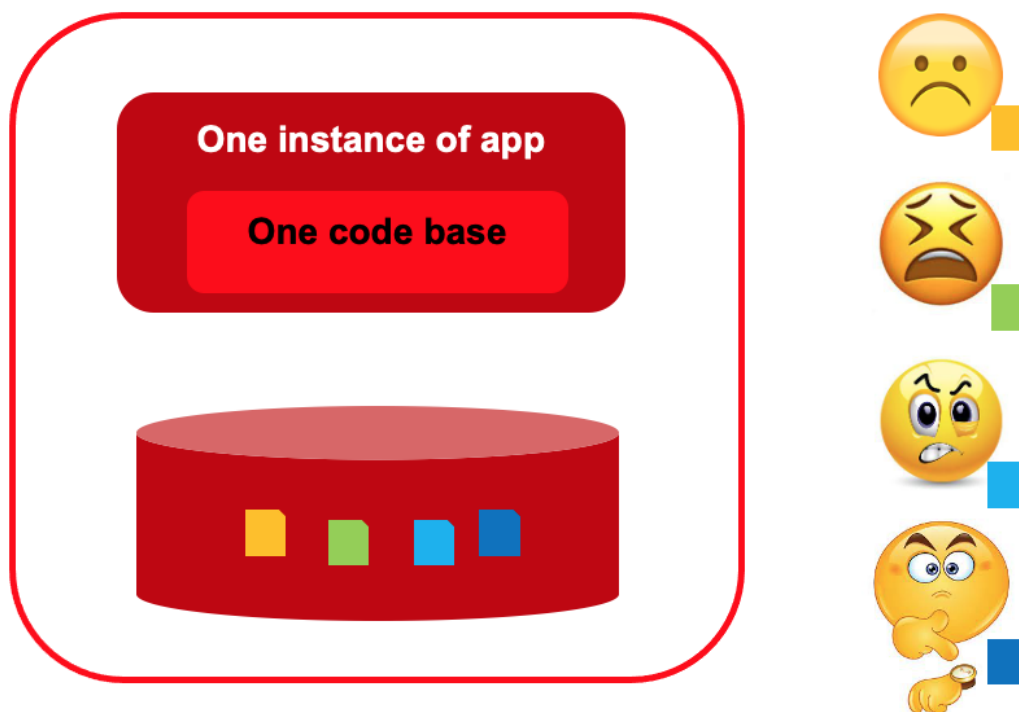
From a technical perspective, kippy is unique in that it does NOT provide a rigid Commercial off-the-shelf product.

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



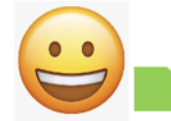
What does that mean for you? You have to put your requirements in a shared backlog for all your clients. You have to wait for the next major release. You have to do workarounds in your business processes to fit the constraints of their product.

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

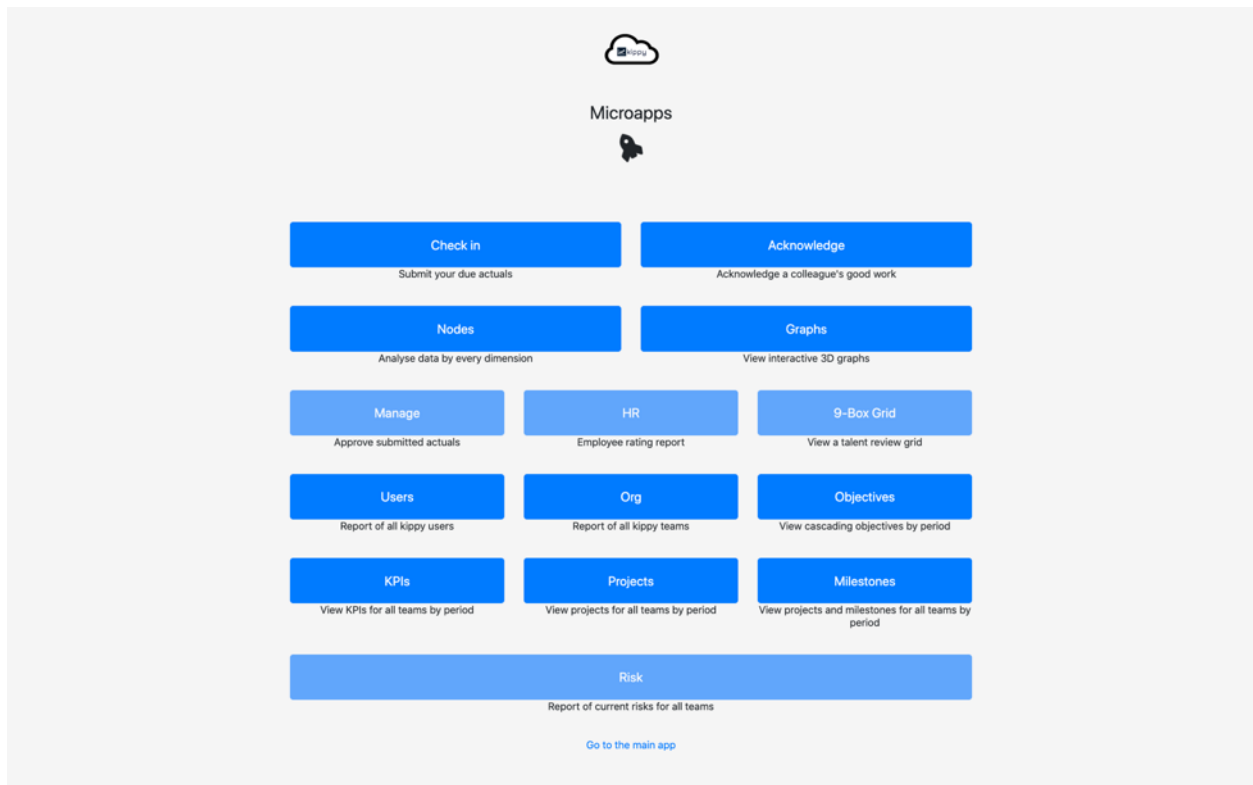


Pull and transform data without coding or support from IT. Dynamically set your actuals by referencing other KPIs with functions like add, subtract, multiply, divide, percentage and average.

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!

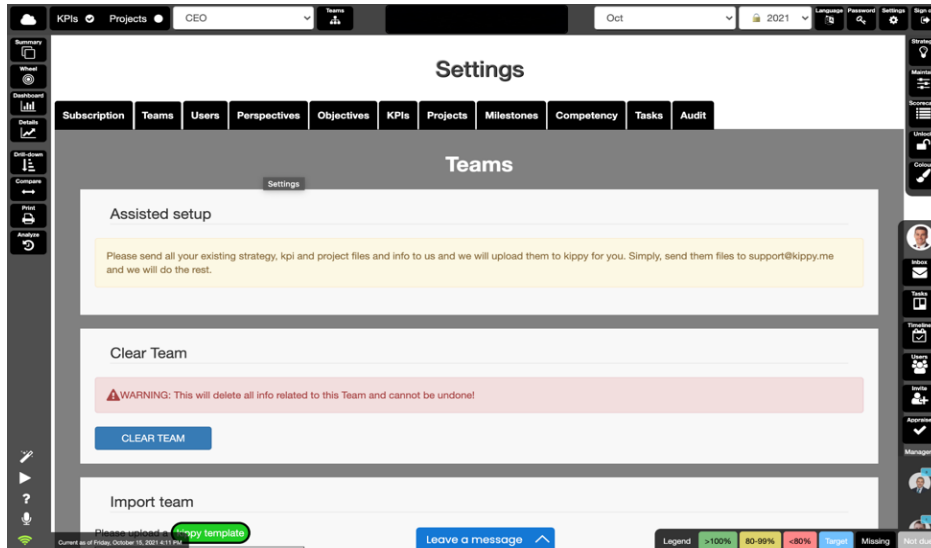
Your Kippy instance can be deployed to

- 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

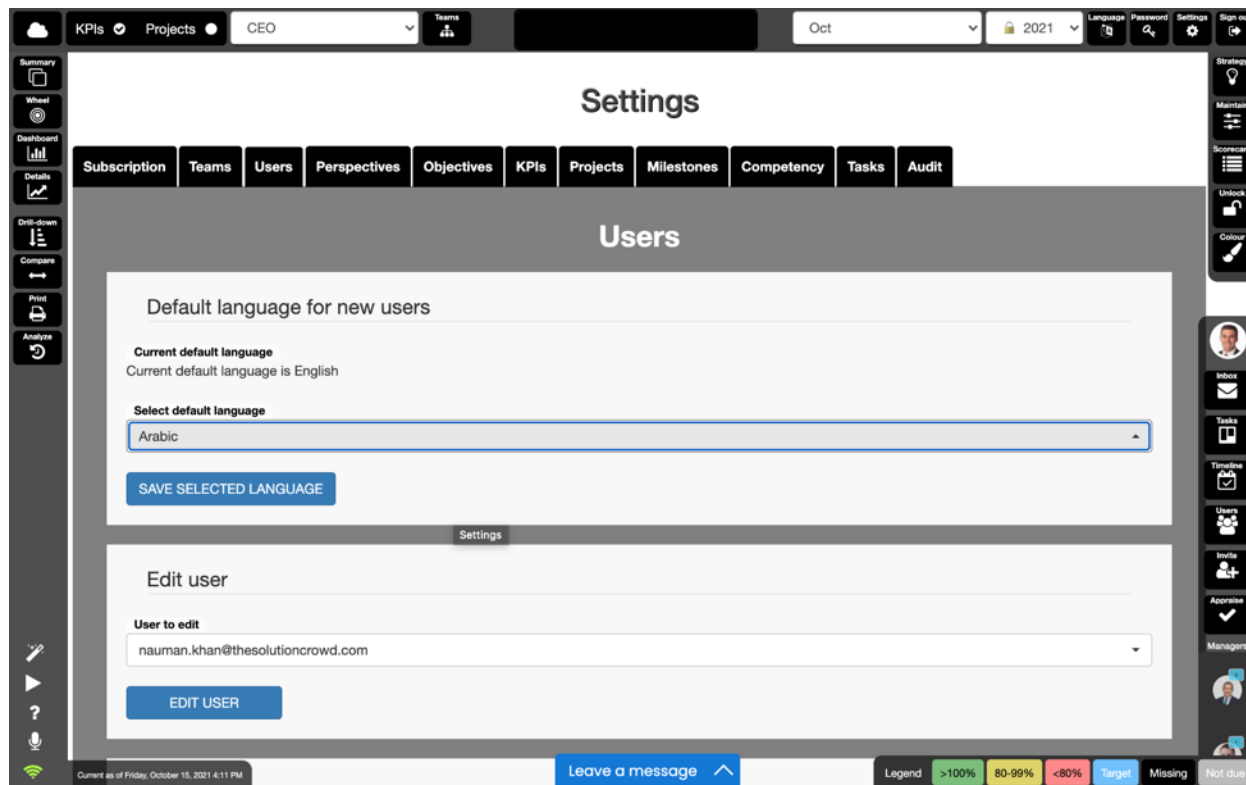
- changing 1x,2x,3x to greater than 3 (e.g. 1x to 100x)
- locking appraisals
- complex weighting and score calculation configuration
- changing default language and color themes
- resetting passwords
- full user management
- edit, rename, move and delete perspectives, objectives, KPIs, projects and milestones
- 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

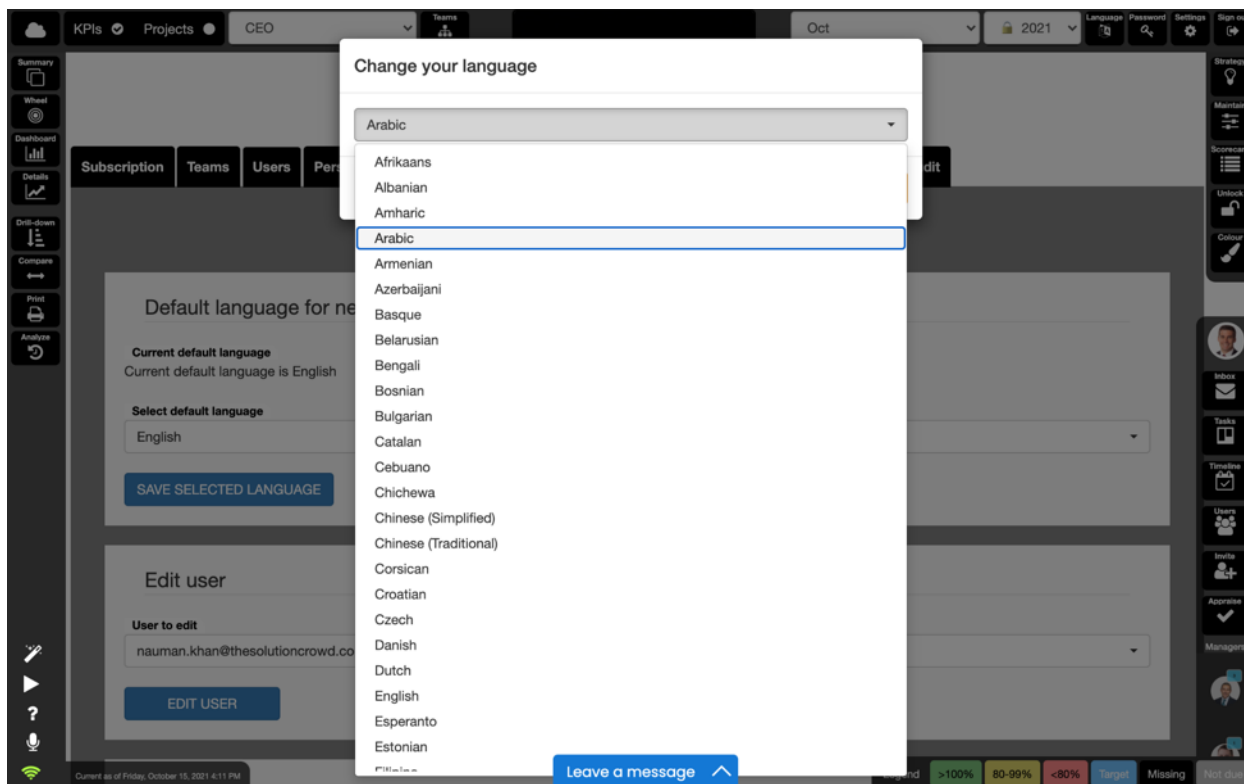


- allow managers to quick set up
- ensure managers set appraisal notes before saving appraisal
- allow full unlock of the system whilst setup is being completed
- calculating non-cumulative KPI/OKR scores on the last score vs the average of the scores that year to date.

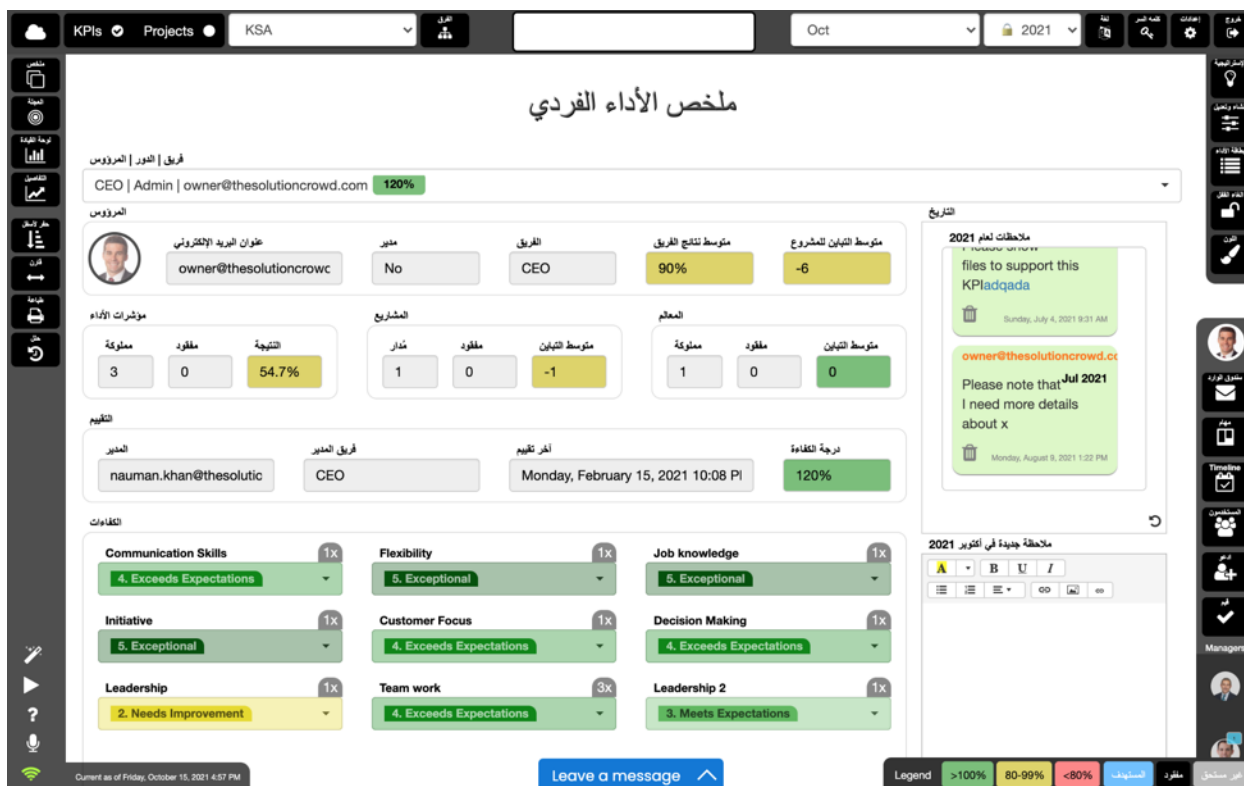
Multi-language

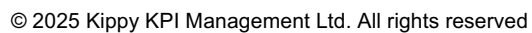
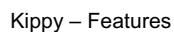
Kippy is available in over 100+ languages, including English and Arabic. The language can be defaulted to the whole organisation. Plus, each user can flip between languages as needed.





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



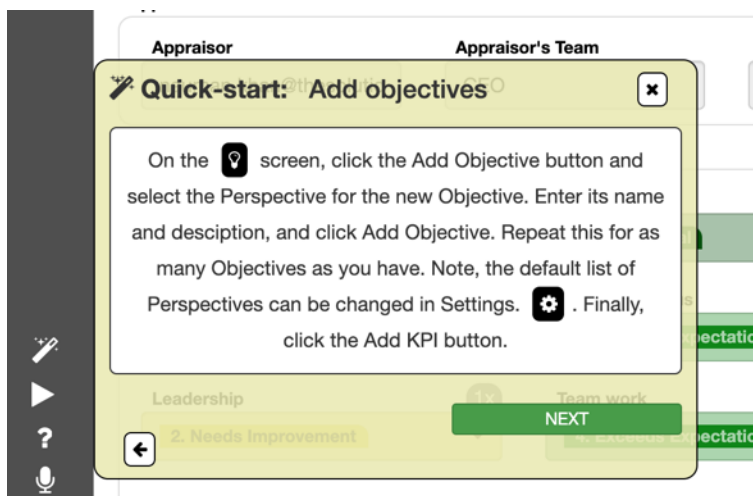


Help

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

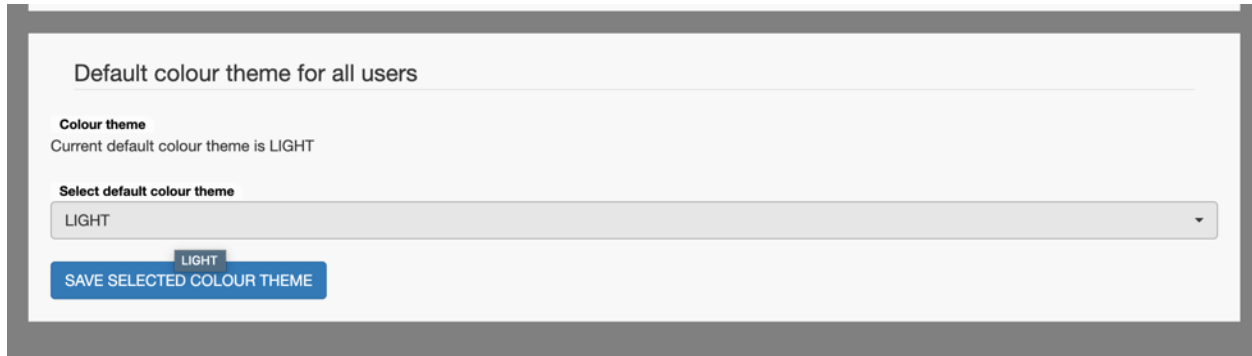
Type your message here...

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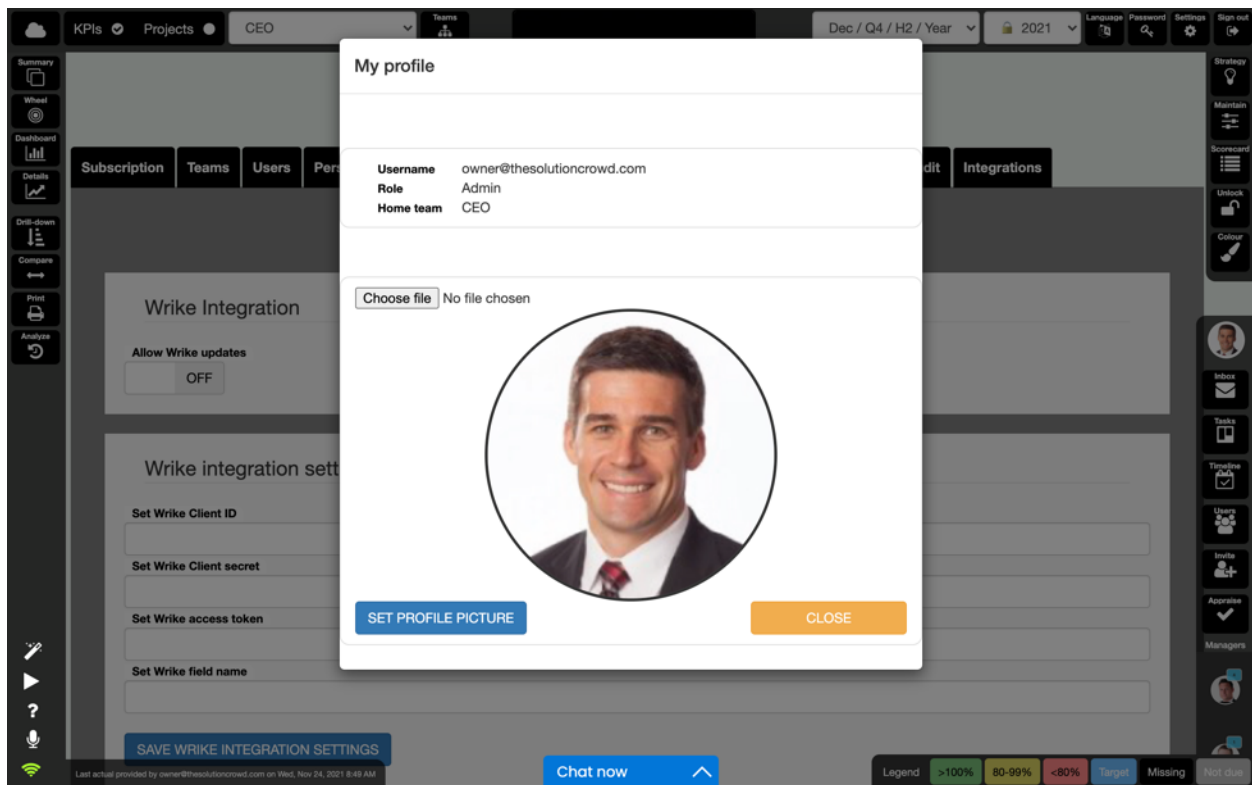
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Personalisations

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



Set user profiles or let users self manage.





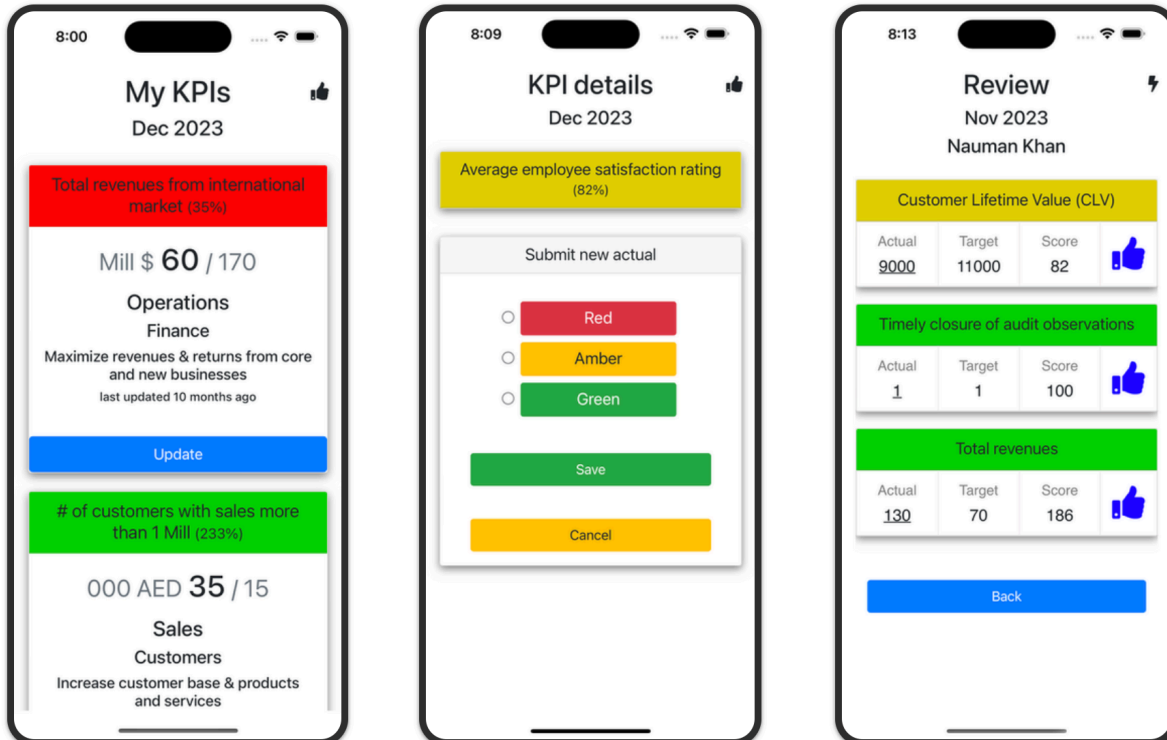
Mobile responsive

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.

| | | |
|---|---|---|
| Helpful phrases What can i say What can i ask Open quick start How to Help | View screen Dashboard Executive summary Wheel Scorecard Compare Analyse Print Show teams View users | Personalize Logo Profile picture Password Background colour |
| KPIs and Projects Show <kpi name> Show <project name> Next Previous Create new KPI Create new project Maintain Projects mode Kpi mode | Change view Change the reporting period to <month> Show next year Show previous year Go to <team name> team | Admin commands Show the audit Unlock plans and actuals Or, say 'Settings for' followed by : Teams Users Perspectives Objectives KPIs Projects Milestones |
| Invite colleagues 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, Slack Login and Microsoft Entra (formerly known as 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 for using web APIs for data exports.

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

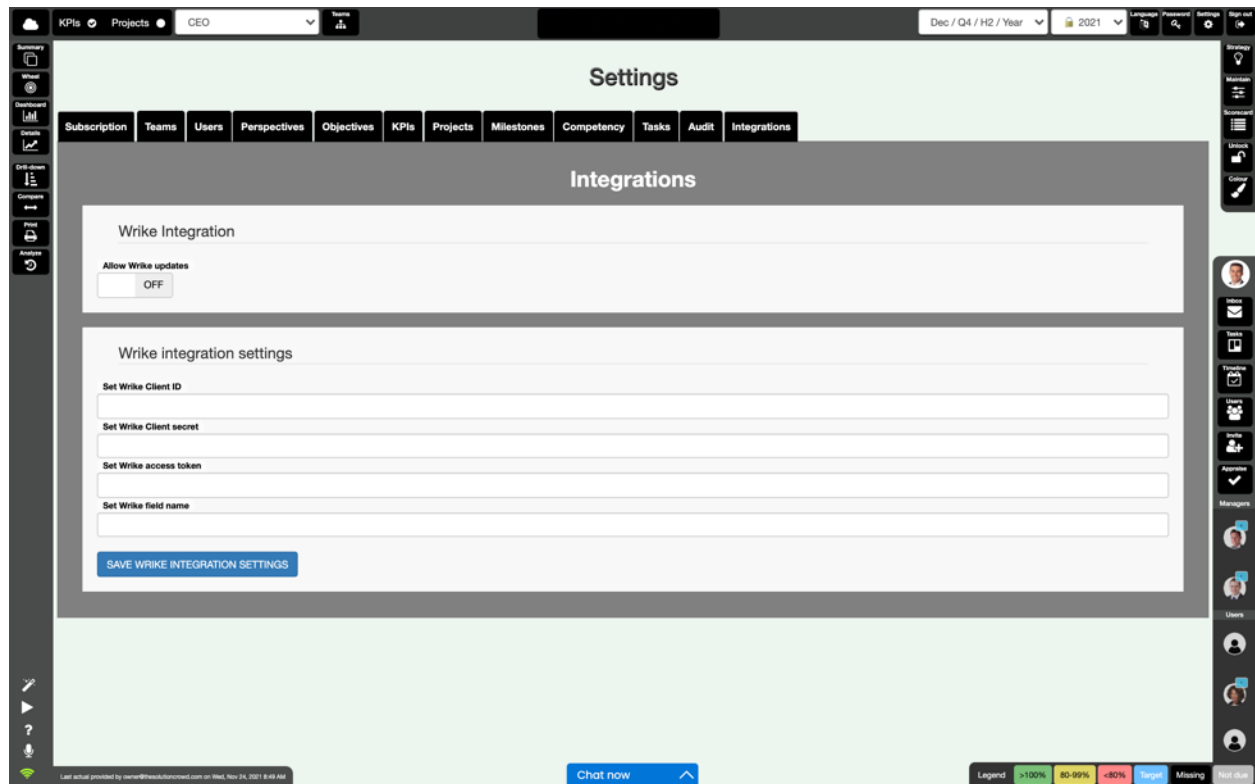
<https://www.kippy.cloud/automate-your-business-processes>

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

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

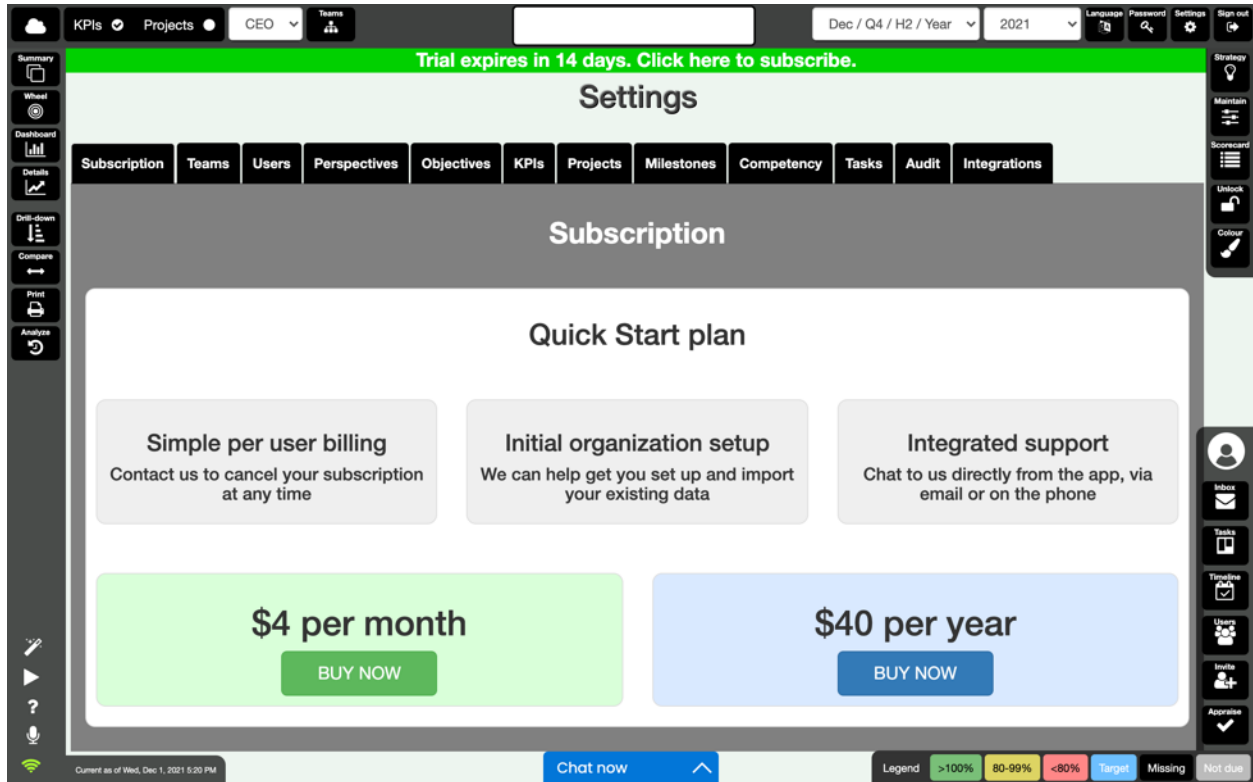
Built-in integrations

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 (IaaS) 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 to learn more