



**Optinacious** 



**A HIGH LEVEL  
OVERVIEW OF  
OPTINACIOUS' EMPLOYEE  
PERFORMANCE  
MANAGEMENT SOLUTION**

# OVERVIEW OF OPTINACIOUS'S SOLUTION

Full Featured Employee Performance Management Functionality that includes:

- Employee, Manager, and HR Portal views
- Performance Appraisals
- Goal Management
- Competency Management
- Peer/360 Reviews
- Integrated Workflow and Document Management
- Multi-lingual support with tools to easily add new languages
- Expansive flexibility via configurable design, supports 1000's of different configurations



# PERFORMANCE APPRAISALS

The review form is flexible to be adapted to many different customer needs. Can optionally add sections, rate on different criteria (or not rate at all), add in standard workflows, and many other options

The screenshot displays a performance appraisal form with several sections. At the top, it shows a 'Section average Rating : 4.00' and a 'Hide All' button. Below this are several criteria sections, each with a 'Manager Rating' field and a 5-point scale (radio buttons for 1-5, and a 'none' option). The criteria include: 'Is flexible - adapts agenda or style when needed', 'Actively learns (from experiences) to improve own performance -', 'Is comfortable when challenged, even in group settings', 'Profits from opening people's viewpoints', 'Initiates changes which will have positive affect on business', and 'Has constructive attitude to urgent issues'. Below these is a 'Mid Year - Manager Comment' field and a 'Manager Comment:' field. A separate window titled 'Identify Goals for Next Review Period' is overlaid on the form. It contains fields for 'Title' (Develop a World Class Team), 'Status' (Approved), 'Target Date' (1/8/2008), 'Related Corporate Goal', and 'Related Goal'. It also has a 'Goal Category' dropdown (Departmental), a 'Description' field (Develop a team that can compete and win), an 'Add comments' button, and an 'Insert New Goal' button. Below the goal section is a table titled 'Dos Gatos Competencies' with columns for 'Competency' and 'Employee Rating'. The table lists 'Job Competency' and 'Leadership', both with an 'Employee Rating' of 3. The 'Job Competency' row includes a description: 'Possesses a high level of skill, knowledge, and ability for his or her position' and an 'Employee Comment': 'I did GREAT this year at this'. A rich text editor is visible below the comments.

- Supports both self - evaluation and manager reviews
- Integrates goals and all evaluation criteria into single form
- Visibility to comments from employees or managers only once they have been shared
- Easy-to-use and intuitive design
- 1000's of different configuration options to support most company needs



# GOAL MANAGEMENT

The goal management aspects of Optinacious's solution are some of the strongest in the industry – designed to make it easy to make an organization a goal-based culture.

- Employees or Managers can both add goals directly from portal or from within review
- Quick copying of prior year's goals
- Track completion of goals
- Approval system for all goal changes
- Different classifications of goals
- Link/Cascade goals from managers and company to individual goals
- Note taking on goal progress
- Quarterly check-in on goal progress

**Your Goals**

View Departmental Goals Throughout the Company  
Click a goal to edit or delete it

- Departmental Goals(Visible to others in the company)  
Department Name: Jon Clemens's department (edit)

Title	% complete	Status
Increase profitability at each client by 15% (Departmental) Related Departmental goal: Improve Profitability by 14% Related company goal: Increase Profitability by 14%	95%	App

**Goal Journal Entries (2008 Annual Review - Current Period)**

Show All Goal Journal Entries  
Hide All Goal Journal Entries

Save

P4P Goal Title: Develop a World Class Team

Date Entered	Goal Journal Entries	Entered By
Apr 2, 2008	I've done great on this.	Jon Clemens
Apr 2, 2008	I'm still doing great on this.	Jon Clemens

(Add new entry...)

**Current Year Goals**

Goals are important for the employee, manager, and the company overall. Please be sure these accurately reflect commitments throughout the year.

Goals For This Review Period Hide All

Goal Summary	Manager Score
Write 6 marketing papers	<input type="radio"/> (none) <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
More Sales	<input type="radio"/> (none) <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5
Totals	N/A

Delete **Goal**

**Title:** \* Write 6 marketing papers

**This title is in:** English (US)

**Related Company Goal:** Group EBIT

**Related Departmental Goal:** test90

**Percent Complete:** 50%

**Target date:** Thursday, March 21, 2019

**Description (Describe what success will look like and include milestones for achieving this goal.) \***

Make sure that 6 new papers are written

**Mid Year - Manager Comment**

**Manager Comment:**



# COMPETENCY MANAGEMENT

Competency management is flexible within Optinacious to accommodate many different ways that company's can evaluate their employees

- Role-based competency assignment
- Managers and HR can view strengths and weaknesses of team(s)
- Configurable to meet the needs of customers
- Linking of competencies to goals
- Add multiple sections of different competencies, each rated differently
- Group competencies into sections, or have each evaluated and commented on separately.

The screenshot displays a performance review interface. At the top, it shows a 'Section average Rating : 4.00' and a 'Hide All' button. Below this, there are several review items, each with a 'Manager Rating' scale from 1 to 5. The main content area shows two performance reviews:

- Tom Smith** (206-555-9987, Services):
  - Review due on Thursday, January 31, 2008.
  - Latest review score: (n/a)
  - Number of completed reviews: 0
  - Average previous review rating: (n/a)
  - Click here to view for Tom Smith's performance portfolio
  - Tasks, Goals, Skills, and Competencies are listed.
  - Competency table:

Competency	Your rating
Leadership	(n/a)
Job Competency	(n/a)
Versatility / Flexibility	(n/a)
Integrity	(n/a)
Written and Verbal Communication	(n/a)
Self-Management	(n/a)
- Bill Stevens** (206-555-6765, Services):
  - Review due on Thursday, January 31, 2008.
  - Latest review score: (n/a)
  - Number of completed reviews: 0
  - Average previous review rating: (n/a)
  - Click here to view for Bill Stevens's performance portfolio
  - Tasks, Goals, Skills, and Competencies are listed.
  - Competency table:

Competency	Employee rating	Your rating
Leadership	(n/a)	(n/a)
Job Competency	(n/a)	(n/a)
Versatility / Flexibility	(n/a)	(n/a)
Integrity	(n/a)	(n/a)
Written and Verbal Communication	(n/a)	(n/a)
Leadership	(n/a)	(n/a)

Below the reviews, there is a table with columns for 'Successful' and 'Need' (partially visible). The table has rows for 'Job/Technical Proficiency (Success)', 'Accountability & Success & Empowerment', 'Creative & Innovative Values: Innovation', 'Communication & Relationship/Conflict Management', 'People Management', and 'Business Management'. Each row has a blue button with a checkmark or an 'x'.

At the bottom, there is a section for 'Employee Comments:'.



# PEER/360 REVIEWS

**Manage Peer Reviews**

Employee: **Robert Stevens**  
Review Period: **2007 Annual Review**

Reviewer	Status		
<b>Buck Tooth</b>	Revisions	<input type="button" value="Remove"/>	<input type="button" value="Send Notification"/>
<b>Kyle Yuma</b>	Needs Notification	<input type="button" value="Remove"/>	<input type="button" value="Send Notification"/>

[Click to add new](#) 🔍

- Easy to solicit feedback from both internal and external individuals
- Quickly find individuals to provide peer reviews
- Dedicated Peer Review Portal for those performing these reviews
- Ability to make feedback appear anonymous to the employee – yet the manager can see who provided the feedback



# INTEGRATED WORKFLOW AND DOCUMENT MANAGEMENT

**My Tasks**

You have 1 form waiting on your comments.

From: Carl Corcoran [carlo@gmail.com]  
To: jonc@jakoba.com  
Subject: Fwd: FW: Its time for your annual performance review

The 2007 First Half Review for is just starting. We believe it is important to conduct these reviews so that all employees can develop our skills and capabilities as well as for the overall health of the company. Please use this process as a time to define what you have that has been good, what you need to work on, and what are the things you will commit to doing in the coming year that will have the most positive impact on this company and your group. Please be both specific and objective in your self assessments, as this will be the most beneficial for both you and your manager.

**Tools**

There are a number of performance review forms available. There is an option for managers through the system.

Your Performance tasks view

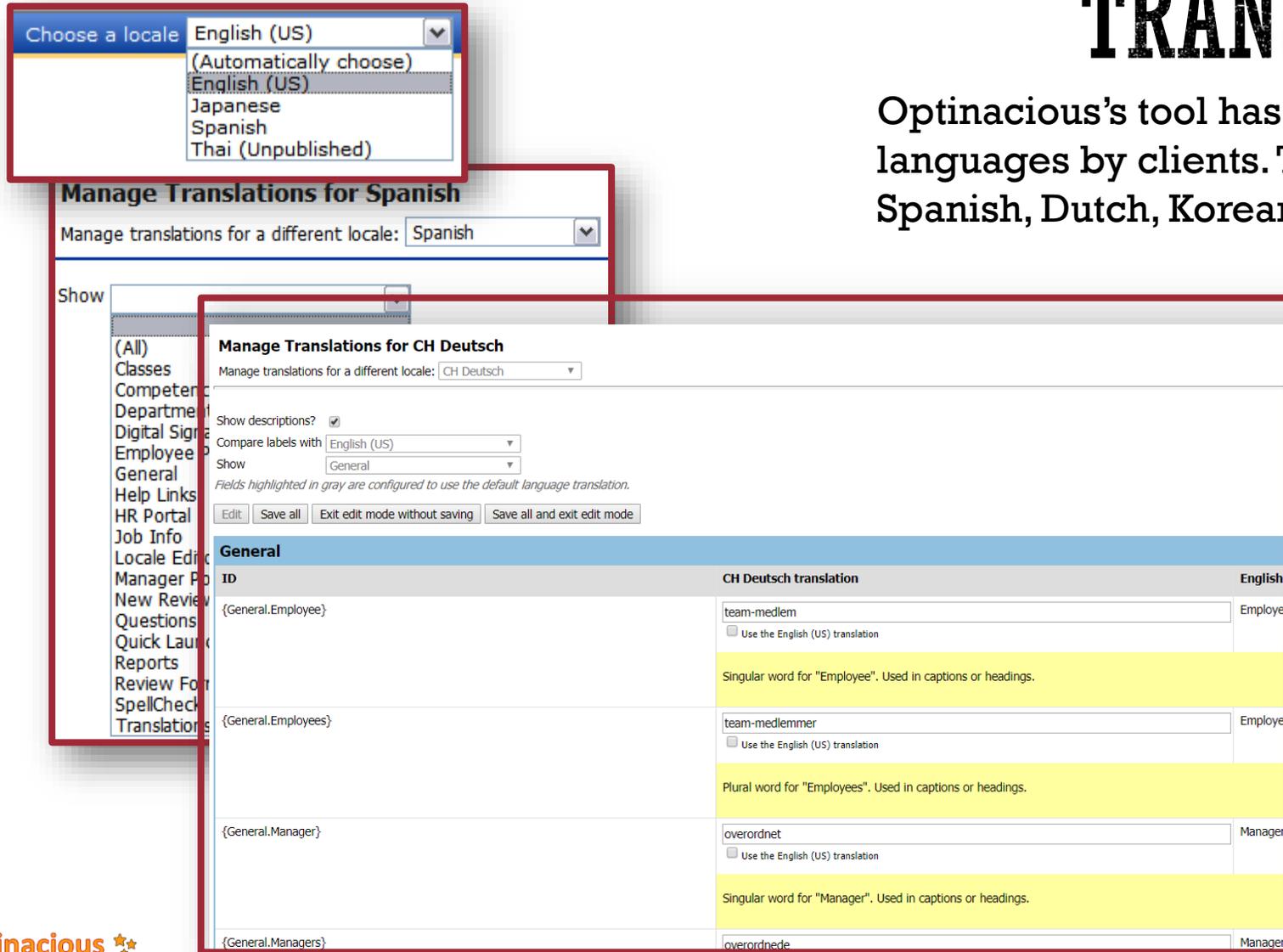
Review	Employee	Signed?	Manager	Signed?	Review Status	Manager Rating	Employee Rating	Due Date (blank if it's finished)
	Bill Stevens		Jon Clemens		●●●●○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007
	Brittany Michaels		Bill Stevens		●●○○○○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007
	Carl Corcoran		Jon Clemens		●●●●○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007
	Johan Pellicaan		Sarah Lopez		●●○○○○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007
	Jon Clemens		Sarah Lopez		●●●●○	3.83	4.00	Due on Thursday, Jan 11, 2007
	Leslie Foster		Jon Clemens		●●●○○	3.00	(n/a)	Due on Thursday, Jan 11, 2007
	Rory Michaels		Johan Pellicaan		●●●●○	(n/a)	4.00	Due on Thursday, Jan 11, 2007
	Sanjay Batra		Bill Stevens		●●○○○○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007
	Sarah Lopez				●●○○○○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007
	Tom Smith		Jon Clemens		●●○○○○	(n/a)	(n/a)	Due on Thursday, Jan 11, 2007

- Email-based reminders with embedded links to prompt action
- Task section on all portals outline important dates and to-do's.
- HR visibility into status and all reviews
- Flexible workflow
- Access to all past forms
- Digital signatures



# MULTI-LINGUAL SUPPORT / TRANSLATION ENGINE

Optinacious's tool has been translated in many languages by clients. These include English, German, Spanish, Dutch, Korean, Chinese, Thai, and Arabic



The screenshot displays the 'Manage Translations' interface. At the top, a dropdown menu titled 'Choose a locale' is open, showing options: English (US), (Automatically choose), English (US), Japanese, Spanish, and Thai (Unpublished). Below this, there are two overlapping panels. The first panel is titled 'Manage Translations for Spanish' and shows a dropdown for 'Manage translations for a different locale' set to 'Spanish'. The second panel is titled 'Manage Translations for CH Deutsch' and shows a dropdown for 'Manage translations for a different locale' set to 'CH Deutsch'. It includes a 'Show descriptions?' checkbox (checked), a 'Compare labels with' dropdown set to 'English (US)', and a 'Show' dropdown set to 'General'. Below these are buttons for 'Edit', 'Save all', 'Exit edit mode without saving', and 'Save all and exit edit mode'. A table of translations is visible, with columns for 'ID', 'CH Deutsch translation', and 'English'. The table contains three rows of translations for 'Employee' and 'Manager' terms, with yellow highlights under the German translations and their descriptions.

ID	CH Deutsch translation	English
{General.Employee}	team-medlem <input type="checkbox"/> Use the English (US) translation Singular word for "Employee". Used in captions or headings.	Employee
{General.Employees}	team-medlemmer <input type="checkbox"/> Use the English (US) translation Plural word for "Employees". Used in captions or headings.	Employees
{General.Manager}	overordnet <input type="checkbox"/> Use the English (US) translation Singular word for "Manager". Used in captions or headings.	Manager
{General.Managers}	overordnede	Managers

- Quick selection of language dynamically changes all labels to desired language
- Online tools for managing all translations
- Can do side by side translations with two languages
- Same tool can be used to quickly customize any labels on the site in default language
- Easy and inexpensive to add new languages at any time
- Multiple permission levels so you can outsource translations

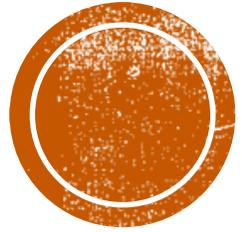
# APPROVAL WORKFLOW

The screenshot shows a web interface for managing approvals. The top section, titled 'Approvals Portal', indicates 'You have 1 approvals pending.' and includes a 'Review Period' dropdown menu set to '2011 Annual Review'. Below this are two checked checkboxes: 'Show already approved' and 'Show pending approvals'. A secondary window titled 'Manage Approvals for Lindsey Mundy' is overlaid, showing a table of approval requests for the '2011 Annual Review'. The table has two columns: 'Name' and 'Approval Status'. The first entry is for Duane Bell, with a status of 'Approved on Friday, September 14, 2012'. The second entry is for Steven Ruesch, with a status of 'Approved on Friday, September 14, 2012'. A 'Remove as an approver' link is visible next to Steven Ruesch's name. At the bottom of the table, there is an 'Add new approver' button.

Name	Approval Status
<b>Duane Bell</b> <i>Tectura Executive Office &gt; Duane Bell</i> <i>This is the lead for the review template</i>	
<b>Steven Ruesch</b> <i>Tectura Executive Office &gt; Duane Bell &gt; David Savel &gt; Ivan MacDonald &gt; Joy Bensur &gt; Steven Ruesch</i> <i>Added by you on Friday, September 14, 2012</i> <a href="#">X Remove as an approver</a>	Approved on Friday, September 14, 2012

- Route reviews via a workflow to select individuals for approval and comment
- Route to upper level management by default
- Route to HR to provide HR comments





# HR FUNCTIONS



# HR MANAGEMENT: OVERVIEW

**HR Portal**

**Employee Portal**

**HR Portal**

**Manager Portal**

**My Goals Portal**

**Manage Locales**

**Support Tools**

**Resources**

Users Manual

Definitions Rating Scale

The Performance Management Process

Instructions for Managers

Instructions for Employees

Values: Standards for Leaders

Values: Standards for Functional Experts

**Employee:** Test Manager

**Phone:**

**Status:** Employed

**Number of Employees:** 4

**Anniversary Date:** January 1

**Department:**

**Reports to:**

**Title:**

**Latest Review Rating:**

**HR Tasks**

- Start a new review period
- 📧 Send notifications to managers
- 📧 Send notifications to employees

**Resources**

- Manage Company Goals
- Manage Group Goals
- Manage Reviews
- Manage Reviews - Beta
- Manage Employees
- Manage Inactive Employees
- Manage Job Info
- Manage Competencies
- Manage Resources
- Dashboard

**Reports**

- Past Review Ratings
- Goals Summary
- Goals Summary All
- Review Score Summary
- Review Breakdown
- Review Status
- Average Goal and Value Report
- Mid year review completion report

HR has access to the HR portal where it can:

- Manage company/group goals
- Access reviews of any person
- Manage employee lists
- Manage job descriptions
- Set up help documents
- Run reports



# HR MANAGEMENT: MANAGE REVIEWS

Choose the period you would like to view  
2015 Annual Review (Current period) ▼

Employee  Manager  Department: All ▼ Review Status --Select-- ▼

Manager Rating  Employee Rating  Search

**Employee Links**  
 Show review form link on Employee Portal  
 Allow Employees to Edit reviews  
 Show Digital Sign Link

**Manager Links**  
 Allow Manager to Edit reviews  
Mail To Managers

25 ▼ 1 of 69 ◀◀ 1 ▶▶ Total Records: 1703

Review	Employee	Signed?	Manager	Signed?	Review Status	Manager Rating	Employee Rating	Due Date (blank if it's finalized)	Digitally Sign on Behalf of employee	Digitally Sign on Behalf of manager
	2 test manager semper		Katharina Gerhardt		●●●●●● Unlock	(n/a)	(n/a)		Goal Journal	Sign
					●●●●●● Unlock	(n/a)	3		Goal Journal	Sign
		<input checked="" type="checkbox"/>			●●●●●● Unlock	(n/a)	(n/a)		Goal Journal	Digitally Sign <input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>			●●●●●● Unlock	(n/a)	(n/a)		Goal Journal	<input checked="" type="checkbox"/>
					●●●●●○	4	5	This review was due on Thursday, February 18, 2016	Goal Journal	
		<input checked="" type="checkbox"/>			●●●●●● Unlock	3	(n/a)		Goal Journal	Digitally Sign <input checked="" type="checkbox"/>
					●●●●●○	(n/a)	3	This review was due on Thursday, February 18, 2016	Goal Journal	
					●●●●●○	(n/a)	(n/a)	This review was due on Thursday, February 18, 2016	Goal Journal	
					●●●●●○	(n/a)	4	This review was due on Thursday, February 18, 2016	Goal Journal	
		<input checked="" type="checkbox"/>			●●●●●● Unlock	3	(n/a)		Goal Journal	Digitally Sign
					●●●●●○	(n/a)	(n/a)	This review was due on Thursday, February 18, 2016	Goal Journal	
					●●●●●○	(n/a)	(n/a)	This review was due on Thursday, February 18, 2016	Goal Journal	

- HR Teams can access read only copies of reviews at any review at any time
- HR can also see the status, digitally sign, and control much of the workflow



# HR MANAGEMENT: MANAGE JOBS

Choose a locale English (US)

**Tasks**

- ▶ Find job info to view or edit  Filter by Country All Search by Job Title
- ▶ [Add a new Job Title](#)
- ▶ View a printable list of all job info

**Search Results**

Job Title	Job Summary	Job Requirements
Controlling		
<a href="#">Account Manager Extramuraal</a>	Fabrikanten van zuigelingenvoeding mogen wette...	• Het opstellen en uitvoeren van een regionaal...
<a href="#">Account Manager Horeca</a>		
<a href="#">Account Manager Intramuraal</a>	Fabrikanten van zuigelingenvoeding mogen wette...	- Het opstellen en uitvoeren van een regionaa...
<a href="#">Account Manager Retail</a>	Het werkgebied betreft de bewerking van accoun...	A. Ontwikkelen en goedgekeurd krijgen van comm...
<a href="#">Account Support</a>	Het werkgebied betreft de ondersteuning van ...	A. Ondersteuning Hero/ Hero Baby afdeling. ...
<a href="#">Account Support OOH</a>		
<a href="#">Allround Engineer</a>		

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- If desired, HR teams can store and manage all job descriptions within the site



# HR MANAGEMENT: MANAGE COMPETENCIES

Manage translations for a different locale: English (US)

Show descriptions?

Compare labels with (none)

Show Competencies

*Fields highlighted in gray are configured to use the default language translation.*

Edit Save all Exit edit mode without saving Save all and exit edit mode

### Competencies

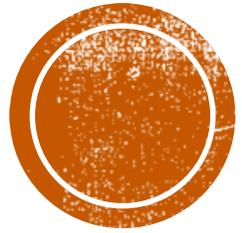
GEN102 (16004)

ID	English (US) translation
{Competencies.16004.17103.Name}	Setting & Executing the Agenda <a href="#">Delete this Competency</a>
{Competencies.16004.17103.Description}	Customer focus, Intellectual Power, Taking charge and Motivating & Developing others
{Competencies.16004.17113.Name}	Taking others with you <a href="#">Delete this Competency</a>
{Competencies.16004.17113.Description}	Cooperation & Communication, Impact & Influence
{Competencies.16004.17123.Name}	Operational Excellence <a href="#">Delete this Competency</a>
{Competencies.16004.17123.Description}	Initiative & Drive, Rigour, Business acumen & Learning agility, Independance, Flexibility

- HR has capacity to manage all of the competencies seen on the site
  - Including all of the translations of the competencies







# OTHER FUNCTIONS



# CONFIGURATION EXAMPLES

Optinacious's EPM solution is configuration based across more than 100 variables – that provide for 1000's of options for clients. Some examples of functionality that can easily be turned on/off for different clients:

- Mid year reviews
- Peer/360 reviews
- Anniversary Date or Focal Point Reviews
- HR Segmentation to support layers of HR teams that can only view select groups of employees' reviews
- Turn on/off support for systematized and centralized Job Descriptions (by location if necessary)
- Goal approvals, goal visibility, and goal editability by employees
- Support for workflows of manager of managers to view/approve reviews
- Digital signature
- Ratings by word, by number (any scale), no ratings
- Using the translation engine, it is very quick to customize any label on the site to fit clients' nomenclature

Optinacious can also adapt to clients' changing needs over time. The configuration files can be versioned so that if a company makes a change, old versions of reviews are kept intact.



# BUILT IN SUPPORT FUNCTIONALITY

[Employee portal] [Manager portal] [HR portal] [Impersonate user]

Show recent log entries

Filter using ID, login, firstname, lastname:  
test Filter  
63 results.  
Show more info

Employee ID	First Name	Last Name	Login
11500	Test	Executive	
11501	Test (Johan)	Test (Pellicaan)	HERODL380G7Jakoba
11505	Test123	test123	HERODL380G7Jakoba1
11523	Test	Medewerker	HERODL380G7test
11527	Test	Manager	HERODL380G7TestManagerNL
11573	Test	Manager	HERODL380G7TestManagerNL
11574	Test1	Employee	HERODL380G7TestEmployeeNL
20504	Test	Test	Test
20553	Test_M	Manager	HERODL380G7TestManagerES

Show recent log entries related to this employee

form 1384, period 13003 [2012 Annual Review]

Show log entries related to this form

Show URLs Show All Details Hide All Details

Source	ID	Saved Date	EmpTotalScore	MgrTotalScore	TotalScore	Objs	Comps	Skill	Status
PageState	103673	3/4/2019 7:07:45 PM				1	0	20	●●●●●○
Live	1384					1	0	20	●●●●●○

form 1385, period 13004 [2013 Annual Review]

Show log entries related to this form

Show URLs Show All Details Hide All Details

Source	ID	Saved Date	EmpTotalScore	MgrTotalScore	TotalScore	Objs	Comps	Skill	Status	Status2	XML
Live	1385					2	0	20	●●●●●●	vEM svEM sbEM #EML sg-M- [V-]	[download]

Optinacious has built in tools to support clients. Including:

- Impersonate functionality: Quickly view the site through the lens of any employee, to get a sense of what exactly they see
- Each time a review is saved a page state is also saved. Through the support pages, its possible for any page state to be viewed or recovered and passed back to clients.
- Support tools include quick views to see changes between various versions of various page states.



# BENEFITS OF OPTINACIOUS'S SOLUTION

- Automates and simplifies assessment process
- Embeds best practices
- Aligns employee and employer goals
- Increases employee/manager communication
- Identifies workforce skill gaps
- Uncovers hidden talent

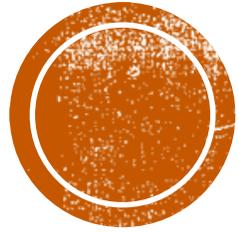


# OPTINACIOUS'S EMPLOYEE PERFORMANCE MANAGEMENT SOLUTION

- ✓ Embeds best practices in Employee Performance Management
- ✓ Automates all administrative tasks
  - ~ Workflow, document management, reporting
- ✓ Connects employee daily effort to overall strategy
  - ~ Cascading Goals
- ✓ Illuminates individual and overall workforce skill strengths/gaps ~  
Workforce Optimization

- ★ Easy to use and familiar to employees
- ★ Value is obvious and quickly achieved
  - ~ non-disruptive
- ★ Interface is familiar and intuitive





# OPTINACIOUS SOFTWARE

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