



# kippy

## Feature Overview

26 Oct 2022

version 1.6



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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 'Strategy' dashboard in the Kippy system. The top navigation bar includes 'KPIs', 'Projects', 'CEO', 'Teams', 'The Solution Crowd', 'Jan', '2022', 'Language', 'Password', 'Settings', and 'Sign out'. The main content area is titled 'Strategy' and is divided into three sections: '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 contains four rows of objectives. A video player overlay is positioned in the center-right of the dashboard, titled 'Getting started' and displaying the text 'System owner guide'. The video player shows a progress bar at 16:14. The bottom of the dashboard features a legend with categories: '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'. A 'Need help?' button is also visible at the bottom center.



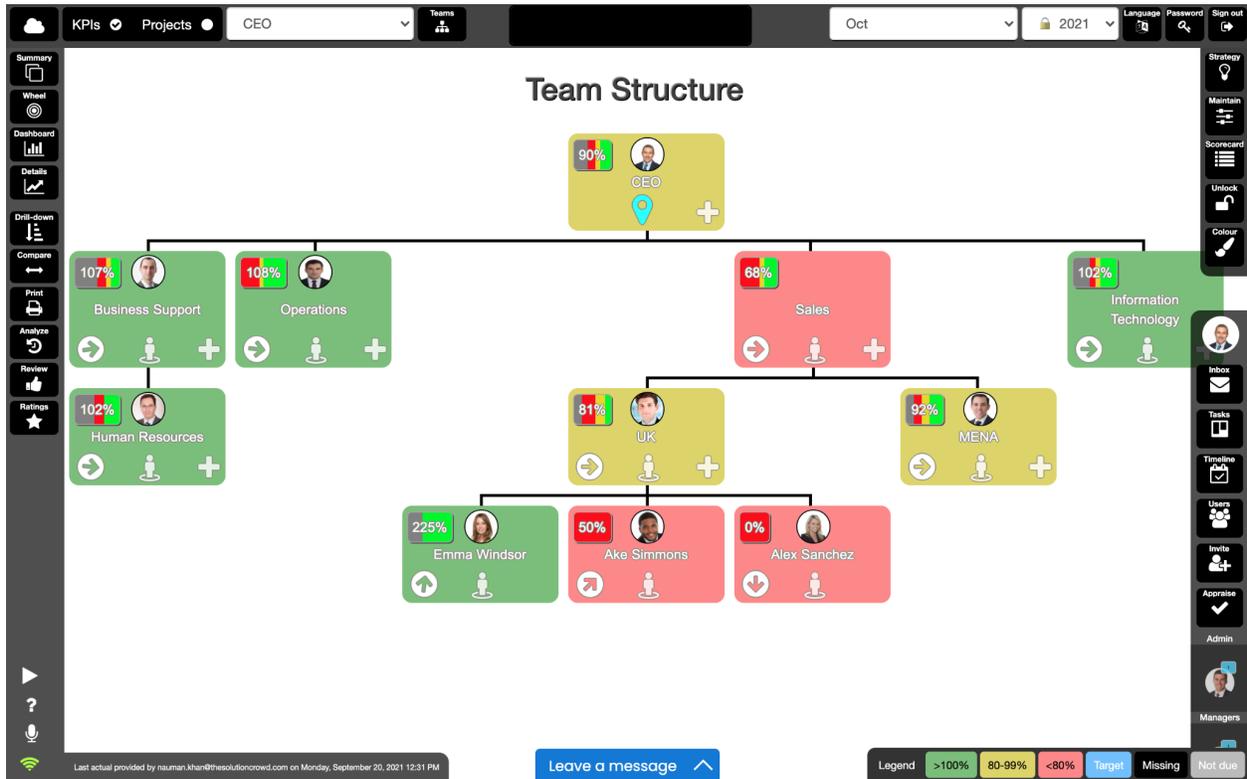
# Strategy

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

The screenshot displays the Kippy Strategy dashboard. At the top, there is a navigation bar with 'KPIs' and 'Projects' tabs, a user dropdown for 'CEO', and a date selector for 'Oct 2021'. The main content area is titled 'Strategy' and is divided into three sections: 'Vision', 'Mission', and 'Values'. Below these is a table of 'Objectives' with columns for 'Perspective', 'Objective', and 'Description'. The dashboard includes a left sidebar with navigation icons (Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, Analyze, Review, Ratings) and a right sidebar with user management and system tools (Strategy, Maintain, Scorecard, Unlock, Colour, User profile, Inbox, Tasks, Timeline, Users, Invite, Appraise, Admin, Managers). A legend at the bottom right shows performance ranges: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (white).

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

# Teams



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

Double-click on the structure for quick zoom in and out. Hold shift and scroll your mouse wheel for slow zoom in and out.



# Kippy – Features

The image displays two screenshots of the Kippy dashboard, illustrating team and user management features. The dashboard background shows a hierarchical team structure with performance metrics.

**Top Screenshot: Add a new team**

- Modal Title:** Add a new team
- Section:** Add to Sales
- Form:** Team name: South America
- Buttons:** CLOSE, ADD TEAM

**Dashboard Data (Top Screenshot):**

- CEO: 107% (Business Support), 108% (Operations)
- Sales: 81% (UK), 92% (MENA)
- Information Technology: 102%
- Human Resources: 102%
- Team Members: Emma Windsor, Ake Simmons, Alex Sanchez

**Bottom Screenshot: Add a new team member**

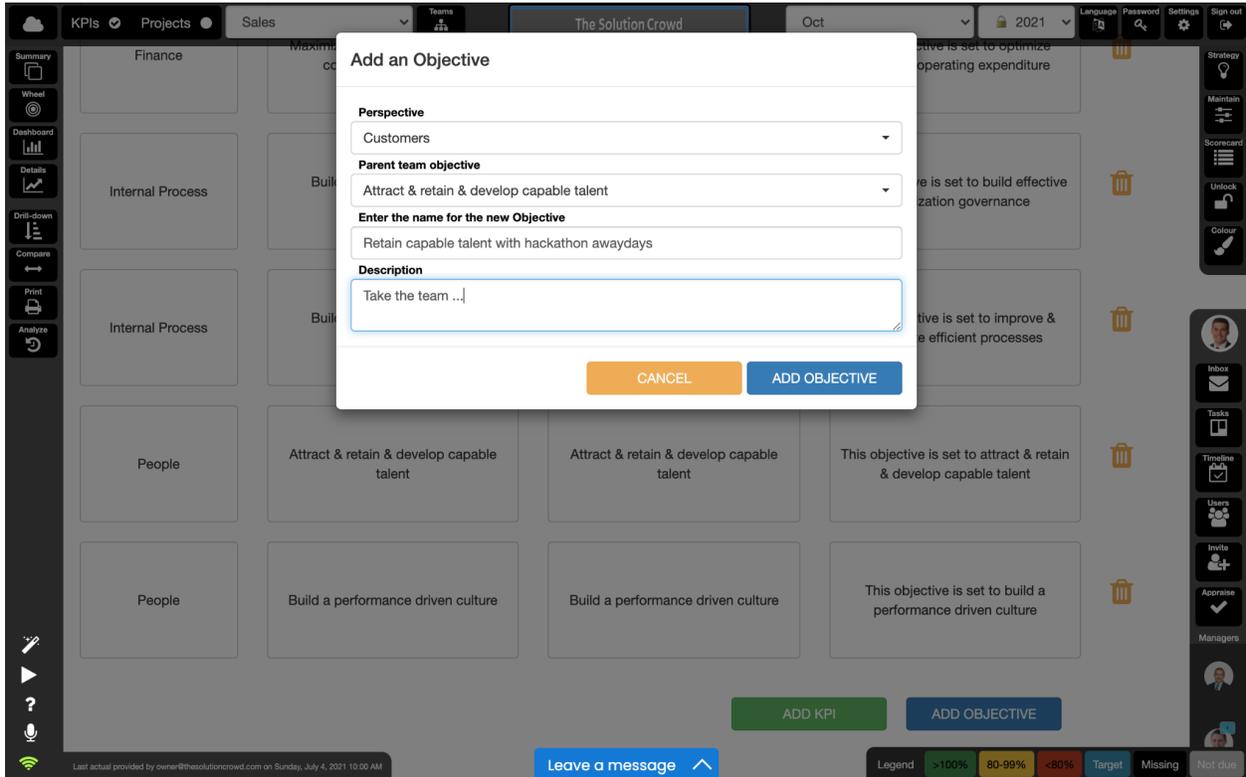
- Modal Title:** Add a new team member
- Section:** Add to UK
- Form:** User's name: Bob Jones; User's email: bob.jones@thesolutioncrowd.com
- Buttons:** CLOSE, ADD USER

**Dashboard Data (Bottom Screenshot):**

- CEO: 107% (Business Support), 108% (Operations)
- Sales: 225% (Emma Windsor), 50% (Ake Simmons), 0% (Alex Sanchez)
- Information Technology: 102%
- Human Resources: 102%
- Team Members: Emma Windsor, Ake Simmons, Alex Sanchez

# 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.



# KPIs

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

The screenshot shows the 'Maintain' interface for a KPI. The breadcrumb trail is 'Customers | Provide quality & innovative customer service | Positive customer feedback'. The KPI Name is 'Positive customer feedback'. The Owner is 'emma.windsor@thesolutioncrowd.c'. The Direction is 'Increase is better', Weight is '1x', and Cumulative is 'Yes'. The Frequency is 'Monthly'. The Data Source is empty. Below this is a table for '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		

Buttons: CREATE NEW KPI, EDIT KPI

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

View all KPIs for the organisation in a single print-friendly report.



## KPI Report (Jun 2022)

Team	Perspective	Corporate Objective	KPI Name	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	2	1	50
CEO	People	Build a performance driven culture	# of Innovation ideas submitted	Total # of innovation ideas submitted & accepted	alem.selimovic@thesolutioncrowd.com	1x	Idea	Yes	HR Dept.	Increase is better	Monthly	15	20	133
CEO	Internal Process	Improve & automate efficient processes	# of key business processes improved and/or automated	Total # of business processes improved and/or automated	imran.khan@thesolutioncrowd.com	1x	Bus. Process	Yes	Quality Dept.	Increase is better	Monthly	7	2	29
CEO	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	6	6	100
CEO	People	Build a performance driven culture	# projects started		test@thesolutioncrowd.com	2x	Unit	Yes	Customer file	Increase is better	Monthly			90
CEO	Customers	Provide quality & innovative customer service	% Customers satisfaction	Average results of customers satisfaction survey	imran.khan@thesolutioncrowd.com	2x	%	Yes	Sales Dept	Increase is better	Semi-annual	80	70	87
CEO	People	Attract & retain & develop capable talent	% Employees Turnover	Total # of left/terminated employees / Total # of employees *100	imran.khan@thesolutioncrowd.com	1x	%	Yes	HR Dept.	Decrease is better	Semi-annual	15	19	79
CEO	Internal Process	Improve & automate efficient processes	% of IT Service tickets closed on time	No. of ticket closed on time / no. of ticket raised * 100	imran.khan@thesolutioncrowd.com	1x	%	Yes	IT Dept.	Increase is better	Monthly	90	75	83
CEO	Finance	Optimize capital & operating expenditure	Average cost per FTE	Total manpower cost / Total # of FTE	alem.selimovic@thesolutioncrowd.com	1x	Mill. USD	Yes	Finance Dept.	Decrease is better	Yearly			
CEO	People	Build a performance driven culture	Average employee satisfaction rating	Average results of employee satisfaction surveys	alem.selimovic@thesolutioncrowd.com	1x	%	No	HR Dept.	Increase is better	Yearly			
CEO	People	Attract & retain & develop capable talent	Average training hours per FTE	Total training hours / Total # of employees	imran.khan@thesolutioncrowd.com	1x	Hour	Yes	HR Dept.	Increase is better	Monthly	10	10	100
CEO	Customers	Increase customer base & products and services	Awareness has spread		sari@thesolutioncrowd.com	1x	10	Yes		Increase is better	Quarterly	50	40	80
CEO	Finance	Optimize capital & operating expenditure	CAPEX budget performance	Actual CAPEX / CAPEX * 100	alem.selimovic@thesolutioncrowd.com	2x	%	Yes	Finance Dept.	Decrease is better	Quarterly	95	95	100
CEO	Customers	Increase customer base & products and services	Customer churn		owner@thesolutioncrowd.com	1x	000's	Yes		Increase is better	Yearly			
CEO	Customers	Increase customer base & products and services	Invite new prospects		nauman.khan@thesolutioncrowd.com	2x	# of people	No		Increase is better	Quarterly	4	4	100
CEO	Internal Process	Improve & automate efficient processes	Man Hrs per Ton of production	Total Man hours worked / Total Ton of production	imran.khan@thesolutioncrowd.com	2x	Hrs Per Ton	Yes	Production	Decrease is better	Monthly	44	50	88
CEO	Finance	Optimize capital & operating expenditure	OPEX budget performance	Actual OPEX / OPEX budget * 100	owner@thesolutioncrowd.com	3x	%	Yes	Finance Dept.	Decrease is better	Monthly	95	85	112
CEO	Internal Process	Build effective organization governance	Timely closure of audit observations	Audit observations & non-conformities closed on time / Total audit observe. & non-conformities * 100	imran.khan@thesolutioncrowd.com	2x	%	Yes	Internal Audit Dept.	Increase is better	Quarterly	70	85	121
CEO	Customers	Increase customer base & products and services	Total # of new international customers	Total # of new international customers	hi@thesolutioncrowd.com	2x	Customer	Yes	Sales Dept	Increase is better	Monthly	25	30	120
CEO	Finance	Maximize revenues & returns from	Total revenues	Total revenue generated as per financial statement	owner@thesolutioncrowd.com	3x	Mill \$	Yes	Operations	Increase is better	Monthly	10	6	60

## 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. At the top, there's a navigation bar with 'KPIs', 'Projects', and a user profile 'Emma Windsor'. The main area is titled 'Maintain' and contains a filter bar with 'Perspective | Objective | KPI'. Below this is a search input field with the placeholder 'Please select an item from the list'. A list of KPIs follows, each with a status (e.g., 'Unapproved') and a description. The selected KPI is 'Customers | Provide quality & innovative customer service | Positive customer feedback'. At the bottom, there's a 'Leave a message' button and a legend for performance indicators: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

## Full OKR mode

The screenshot shows a modal window titled 'OKR mode'. It contains a section 'Set OKR mode on and off' with a toggle switch currently set to 'ON'. To the right of the toggle, there is a text box that reads: '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).

**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

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

# 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

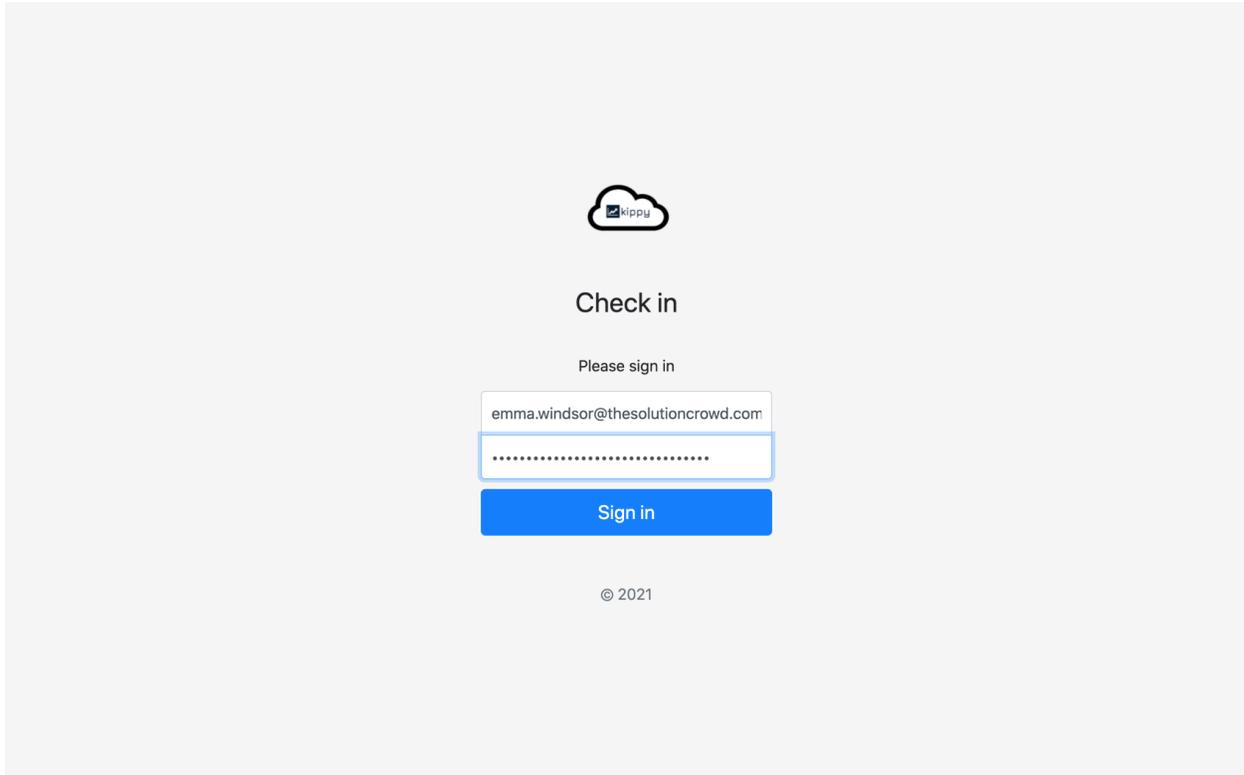
The screenshot displays the 'Scorecard' interface for Emma Windsor. It features a navigation sidebar on the left with options like Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, and Analyze. The main content area is organized into sections: Perspectives, Customers, Finance, Internal Process, and People. Each section contains KPI cards with details such as KPI Name, Direction, Weight, Frequency, Unit, Cumulative Target, Actual, and Score. A legend at the bottom right indicates score ranges: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (white).

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



## Check-in microapp

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





### My KPIs

Positive customer feedback  
(350%)

7 / 2

**Emma Windsor**  
Customers  
Provide quality & innovative customer service

Update

Timely closure of audit observations (100%)

100 / 100

**Emma Windsor**  
Internal Process  
Build effective organization governance

Update

# of innovation ideas submitted

? / 3

**Emma Windsor**  
People  
Build a performance driven culture

Update

### Summary

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

### KPI details

Positive customer feedback (350%)

7 / 2

**Emma Windsor**  
Customers  
Provide quality & innovative customer service

Increase is better | 1x | Monthly | Cummulative

Submit new actual

Actual

7

Save

Cancel



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

The KPI below has a Unit of Completed.

The screenshot shows a Kippy interface for a KPI titled "Hold town hall event (100%)". The KPI is marked as "Completed Yes" with a unit of "STM" (Strengthen Cross Functional Working). A dialog box titled "Submit new actual" is open, showing two radio button options: "Not Completed" and "Completed". The "Completed" option is selected. Below the radio buttons are "Save" and "Cancel" buttons. The interface also includes a "Sign out" link in the top right corner and a "Kippy" logo in the top left corner.

The KPI below has a Unit of OKR.

### 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

## Maintain UI

- Actual can be provided directly by the manager



KPIs Projects Emma Windsor
Oct 2021
Language Password Settings Sign out

## 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

**Unit**

**Description**

**Formula**

**Data Source**

**Direction**

Increase is better

**Weight**

1x

**Frequency**

Monthly

**Cumulative**

Yes

**Targets and actuals for 2021**

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

**KPI approval status**

Approved

CANCEL
SAVE KPI

Current as of Friday, October 15, 2021 3:42 PM
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





## 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 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")
```



# Reviewing actuals

## Manager UI

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

**Employee KPI Review**

Users with KPIs due for review: Emma Windsor (2 of 4 KPIs to review)

KPI Description	Status
Emma Windsor   People   Attract & retain & develop capable talent   Number of ex-colleagues recruited	SET BY YOU
Emma Windsor   People   Build a performance driven culture   # of innovation ideas submitted	NOT SUBMITTED
Emma Windsor   Customers   Provide quality & innovative customer service   Positive customer feedback	APPROVE
Emma Windsor   Internal Process   Build effective organization governance   Timely closure of audit observations	SET BY YOU

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



## Manager approval microapp

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

Manager

Please sign in

nauman.khan@thesolutioncrowd.com

Password

Sign in

© 2021

Kippy Sign out

## Individual KPIs

2021 > Oct

Search

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

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



## Employee KPI Review

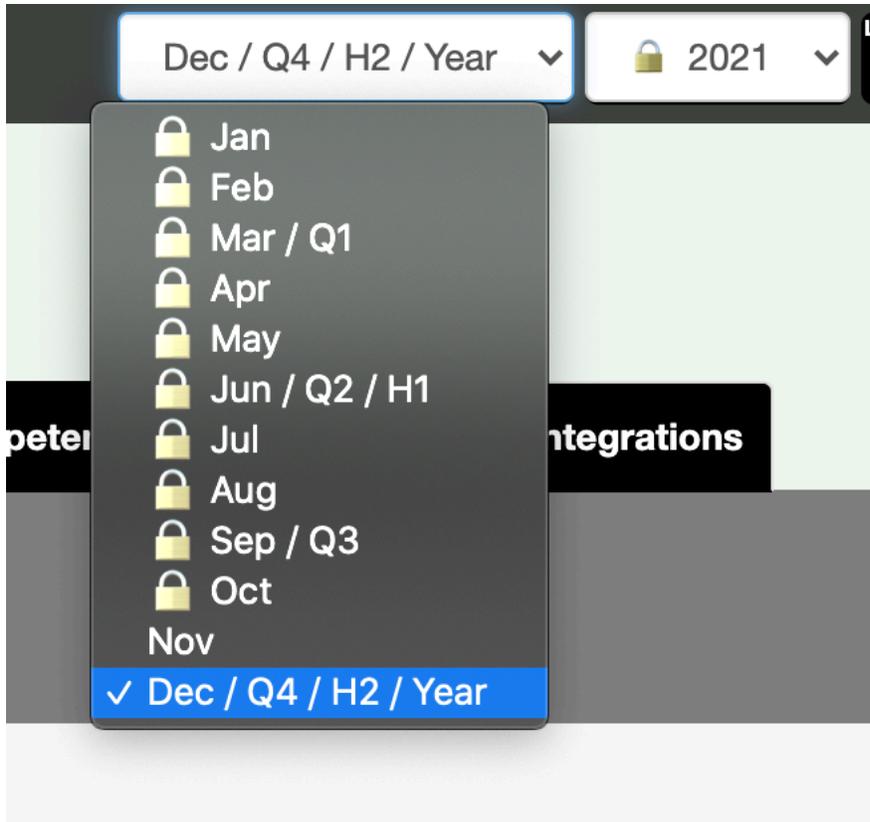
[2021](#) > [Oct](#) > Emma Windsor

KPI Name	Frequency	Forecast	Actual	Score	Last submission	Approval
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	<a href="#">Approve</a>
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.

The screenshot displays the Kippy dashboard for a KPI titled "Awareness has spread". The interface includes a top navigation bar with "KPIs" and "Projects" tabs, a user profile for "CEO", and a date selector for "Oct 2021".

**KPI Details:**

- Perspective | Objective | KPI:** Customers | Increase customer base & products and services | Awareness has spread
- Details:**
  - Perspective:** Customers
  - Objective:** Increase customer base & products and services
  - KPI Name:** Awareness has spread
  - Owner:** sari@thesolutioncrowd.com
  - Direction:** Increase is better
  - Weight:** 1x
  - Frequency:** Quarterly
  - Cumulative:** Yes
  - Unit:** 10
  - Data Source:** [Empty field]

**KPI Targets and Actuals graph:** A line graph showing performance over four quarters (Q1-Q4). The y-axis ranges from 0 to 1000. The data points are approximately: Q1 (500), Q2 (700), Q3 (800), and Q4 (950).

**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:** A chat window titled "Notes for 2021" showing a message from "nauman.khan@thesolutioncrowd.com" dated "16-Feb-2021". The message content includes "Needs to be reviewed Jun 2021 at the next board meeting" and "lorem-ipsum.pdf".

**New note for Oct 2021:** A text input area with a "File attached" label and a "Leave a message" button.

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



# 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

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

History

Audit Log



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

---



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

---



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

---



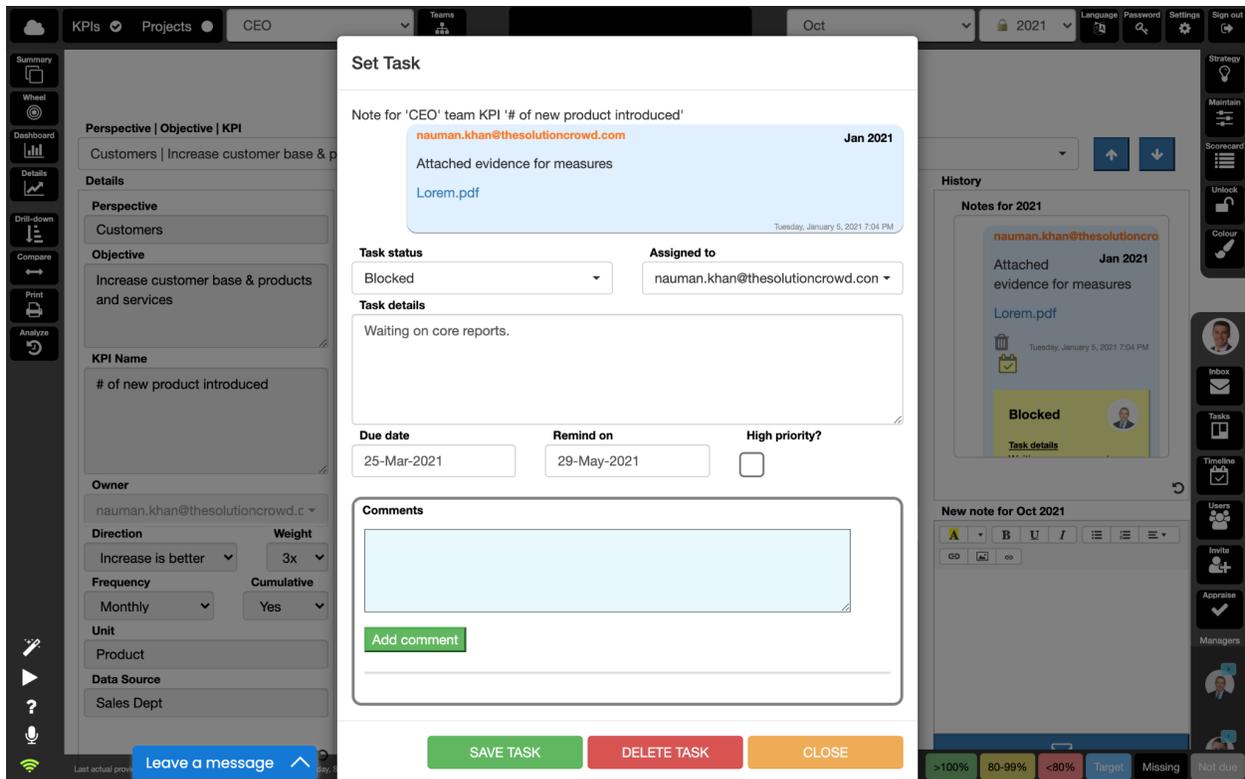
## Mentions

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

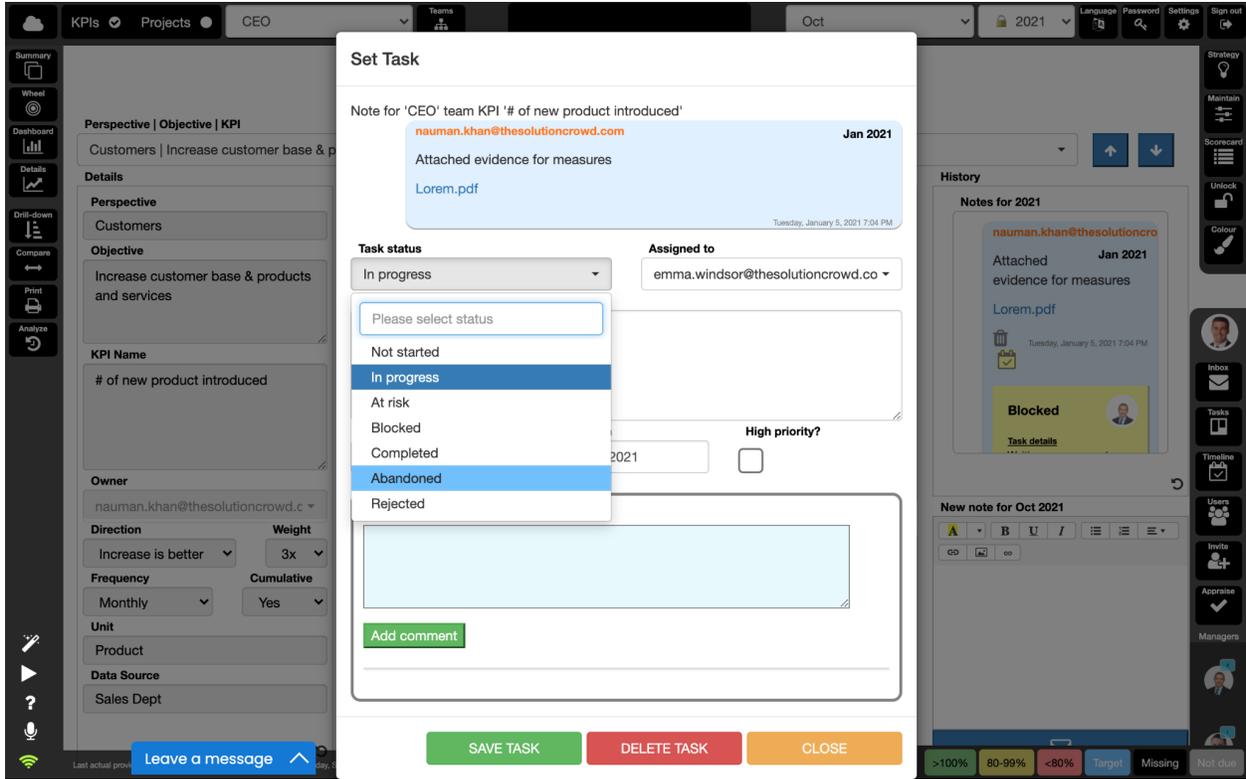
# Tasks

## Task setting

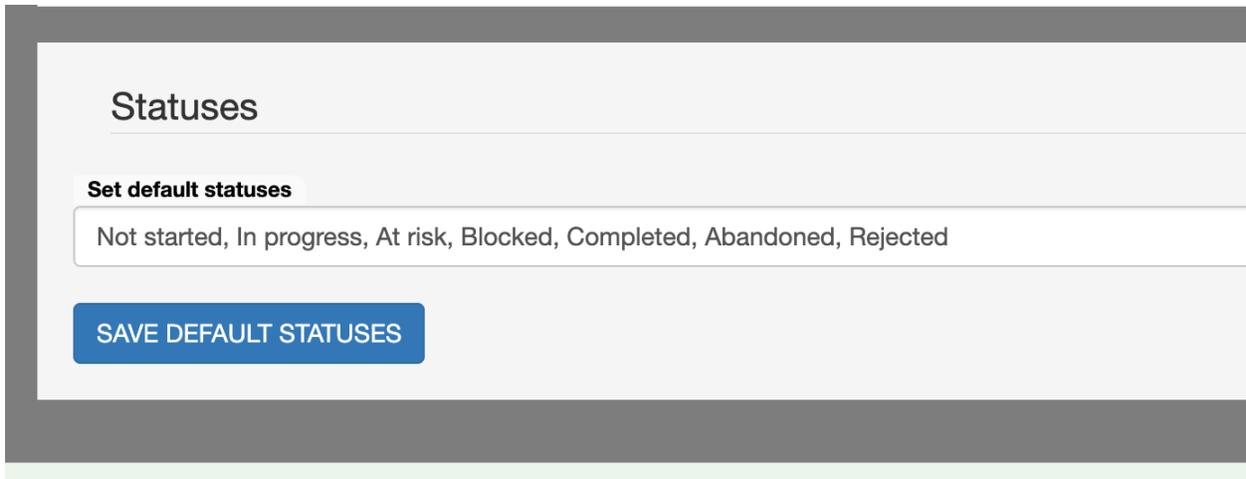
Each KPI can have tasks assigned which can be used to track OKRs, improvement activities and actions on other employees and managers.



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



The set of task statuses are configurable.



# Task viewing

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

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

**Task Card 1:** From owner@thesolutioncrowd.com, dated Jun 2021. Subject: 'Please tel why the Jul is red'. It includes a trash icon and a reminder icon.

**Task Card 2:** From owner@thesolutioncrowd.com, dated Jan 2021. Subject: 'Test ....'. It includes a trash icon and a reminder icon. Below the subject is a yellow 'In progress' box with 'Task details' and 'Test' listed. A 'Remind on 22-Jan-2021' button is visible. At the bottom, there is a 'Leave a message' button.

**Chart 1: Total revenues from new products**  
Note for 'CEO' team KPI  
Maximize revenues & returns from core and new business  
Mill \$ : 1x : Increase is better : Cumulative : alem.sellimovic@thesolutioncrowd.com  
The chart shows monthly revenue from Jan to Dec. Red bars represent core business revenue, and green bars represent new products revenue. A blue line shows the cumulative total, which increases steadily over the year.

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



The screenshot displays the 'Tasks' screen in Kippy. At the top, there's a navigation bar with 'KPIs', 'Projects', 'Sales', 'Teams', 'The Solution Crowd', 'Oct', '2021', 'Language', 'Password', and 'Sign out'. The main area is titled 'Tasks' and is divided into four columns: 'Not started (1)', 'In progress (2)', 'At risk (1)', and 'Blocked (1)'. Each column contains task cards. For example, in the 'Not started' column, there's a card for 'Needs to be reviewed at the next board meeting' with a due date of 'Jun 2021' and a 'Not started' status. In the 'In progress' column, there are two cards: 'Retro' with a due date of 'Feb 2021' and 'Check out' with a due date of 'Jan 2021'. The 'At risk' column has one card 'RF57 - Tech review initiative' with a due date of 'Feb 2021'. The 'Blocked' column has one card 'Attached evidence for measures' with a due date of 'Jan 2021'. A sidebar on the left contains navigation icons like 'Summary', 'Wheel', 'Dashboard', 'Details', 'Drill-down', 'Compare', 'Print', 'Analyze', 'Review', and 'Ratings'. A sidebar on the right contains user management icons like 'Strategy', 'Maintain', 'Scorecard', 'Unlock', 'Colour', 'Inbox', 'Tasks', 'Timeline', 'Users', 'Invite', 'Appraise', 'Admin', and 'Managers'. At the bottom, there's a 'Leave a message' button and a legend with color-coded status indicators: '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.

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

The screenshot displays the 'Timeline' screen in Kippy. At the top, there's a navigation bar with 'KPIs', 'Projects', 'Sales', 'Teams', 'The Solution Crowd', 'Oct', '2021', 'Language', 'Password', and 'Sign out'. The main area is titled 'Timeline' and shows a Gantt-style chart. The chart has a timeline from 8-Feb to 15-Mar. The chart is divided into rows for 'Not started (1)', 'In progress (2)', 'At risk (1)', 'Blocked (1)', 'Completed (1)', and 'Ahead'. Each row contains task cards with dates and descriptions. For example, in the 'Not started' row, there are cards for 'Please complete ...' with due dates of '17-Feb-2021', '23-Feb-2021', and '28-Feb-2021'. In the 'In progress' row, there are cards for '16-Feb-2021' and 'Please submit fee...' with a due date of '15-Feb-2021'. In the 'At risk' row, there is a card for '16-Feb-2021'. In the 'Blocked' row, there are cards for 'Please complete ...' with due dates of '14-Feb-2021' and '28-Feb-2021'. In the 'Completed' row, there are cards for 'Please complete ...' with due dates of '11-Feb-2021' and '16-Feb-2021'. A sidebar on the left contains navigation icons like 'Summary', 'Wheel', 'Dashboard', 'Details', 'Drill-down', 'Compare', 'Print', 'Analyze', 'Review', and 'Ratings'. A sidebar on the right contains user management icons like 'Strategy', 'Maintain', 'Scorecard', 'Unlock', 'Colour', 'Inbox', 'Tasks', 'Timeline', 'Users', 'Invite', 'Appraise', 'Admin', and 'Managers'. At the bottom, there's a 'Leave a message' button and a legend with color-coded status indicators: '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.



# Projects

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

**Project Details**

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

**Details**

Perspective: Customers  
Objective: Increase customer base & products and services  
Project name: Expansion International Action Plan  
Programme: [Blank]  
Project Manager: imran.khan@thesolutio (Weight: 1x)  
Project Sponsor: nauman.khan@thesolutioncrowd.com  
Start Date: 12-Jan-2019, End Date: 09-Dec-2020  
Total Budget: 110000, Total Spent: 13500.C, Variance: 96500.C

**Project Targets and Actuals graph**

History: Notes for 2021

**Project Targets and Actuals table**

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

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



### Project Details

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

**Details**

**Perspective**  
Customers

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

**Project name**  
Expansion International Action Plan

**Programme**

**Project Manager**  
imran.khan@thesolutioncrowd.com

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

**Start Date**  
12-Jan-2019

**End Date**  
09-Dec-2020

**Total Budget**  
110000.0

**Total Spent**  
13500.0

**Variance**  
96500.0

**Project Targets and Actuals graph**

**Expansion International Action Plan**

**Project Targets and Actuals table**

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

**History**

Notes for 2021

New note for Oct 2021

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

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

### Maintain

Perspective | Objective | Project  
Expansion International Action Plan

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

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

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

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

**Milestone name**  
Add more products

**Milestone description**  
Add more products

**Milestone owner**  
alem.selimovic@thesolutioncrowd.com

**Milestone weight**  
1x

**Milestone start date**  
06-Jun-2019

**Milestone end date**  
13-Aug-2020

**Targets and actuals for 2021**

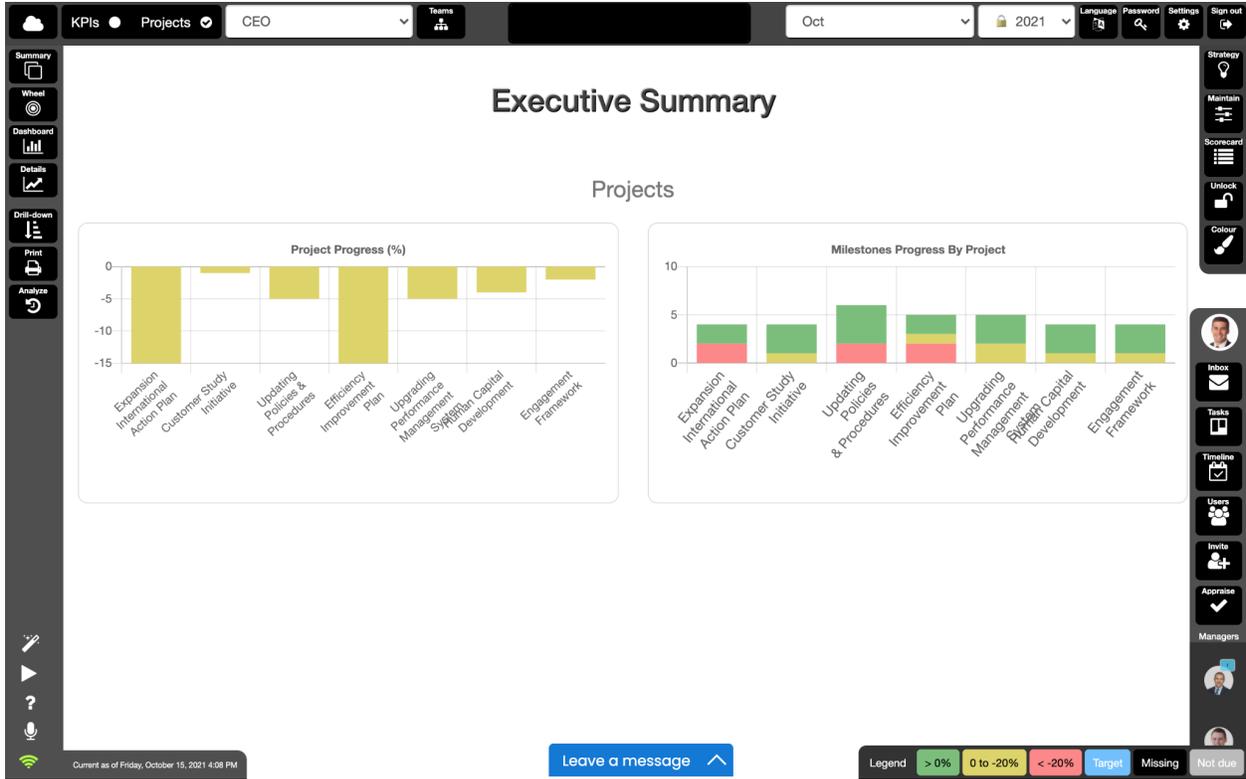
Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Targets</b>				55	66	77	88	99	100			
<b>Actuals</b>					6	10	15	50	60	100		

**Milestone name**  
Explore stockist in europe and africa

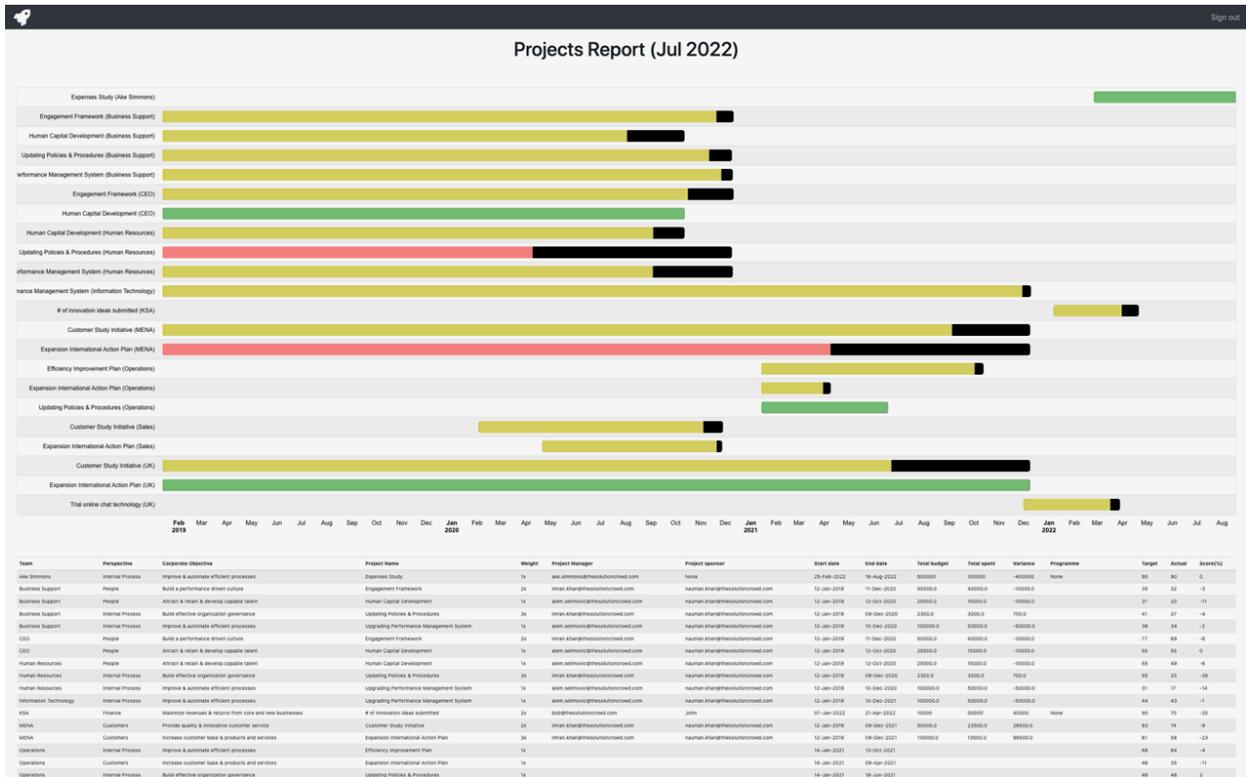
**Milestone description**  
Explore stockist in europe and africa

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

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



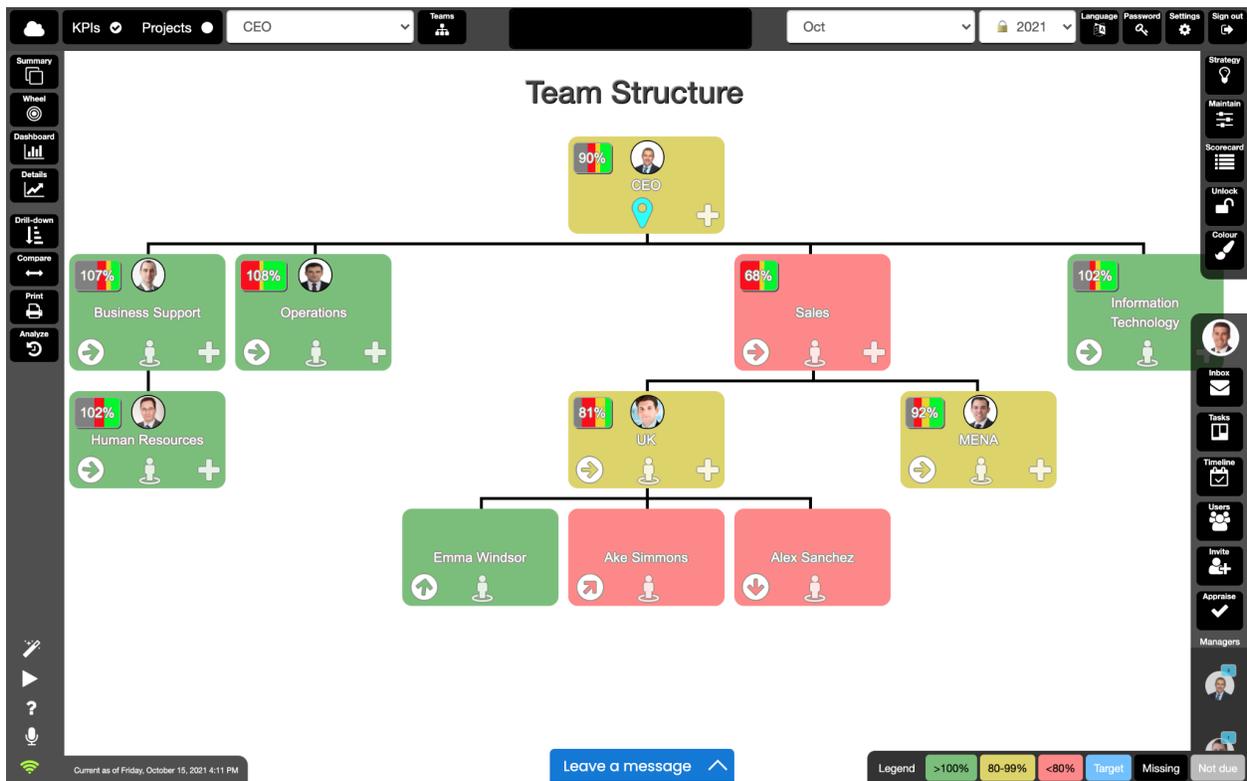
The Projects microapp summarizes all projects and project performance on a Gantt chart.

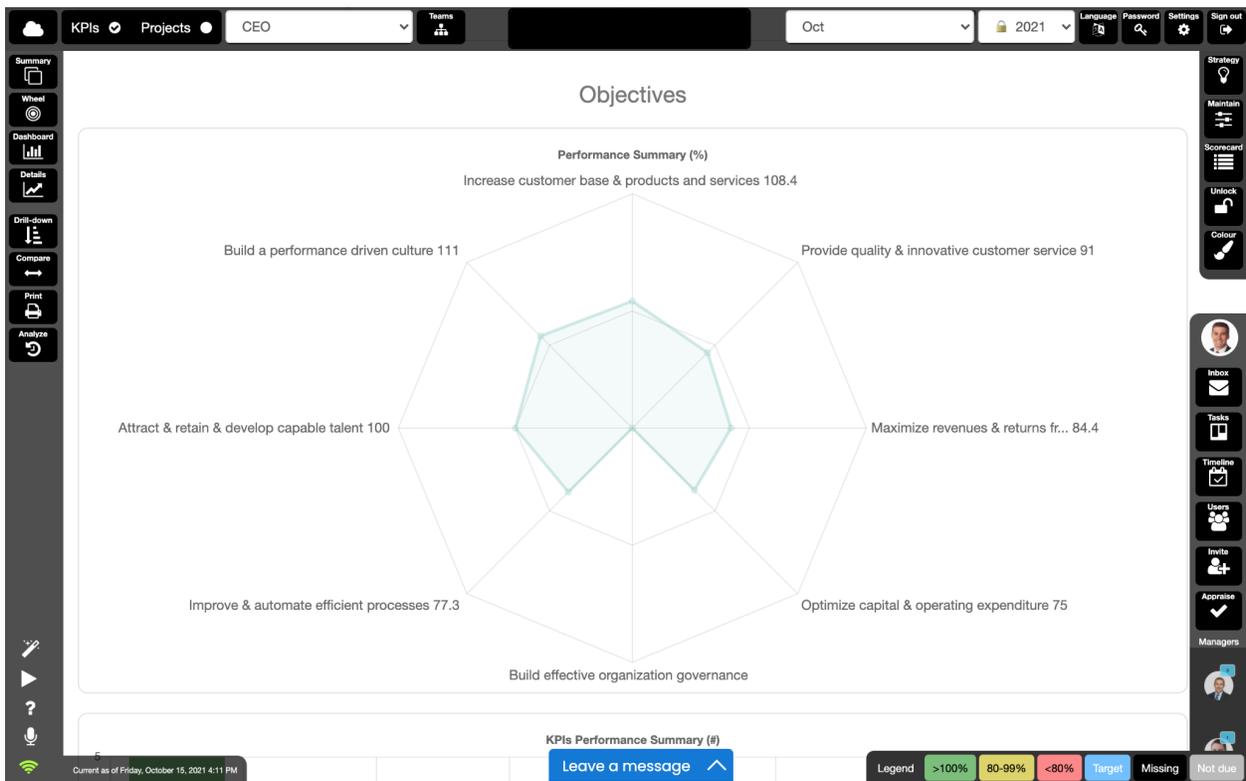
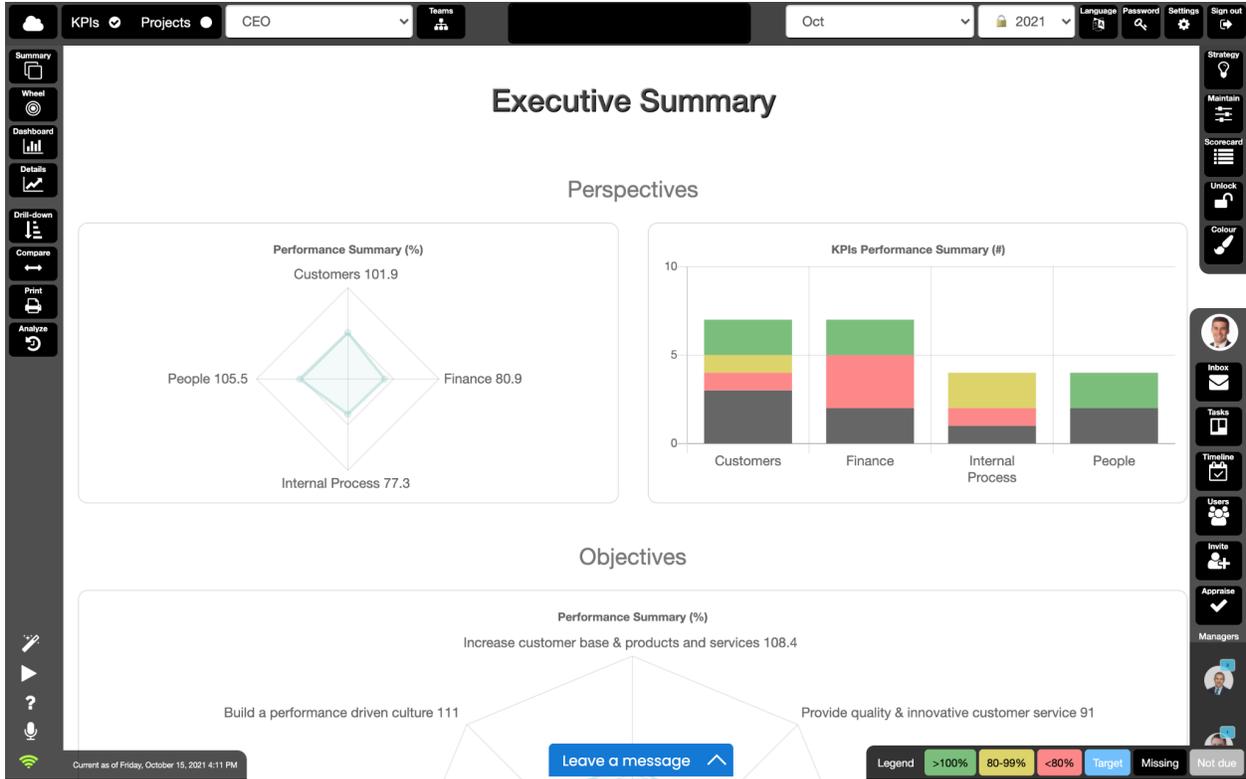


# Live dashboards

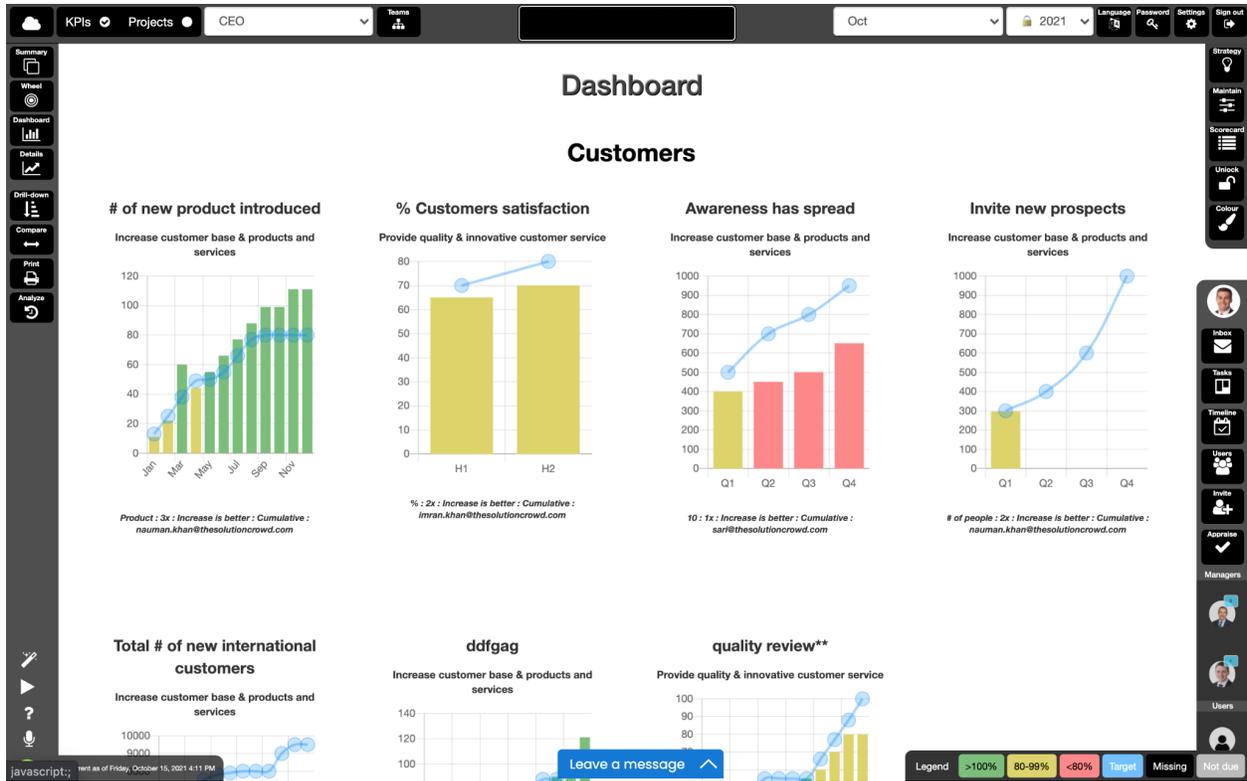
The progress of all this information is used to maintain live dashboards of performance across every dimension, including:

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









### Compare

	CEO	Business Support	MENA	Operations	Information Technology	Human Resources	Sales	Ak
<b>Perspective Customers</b>	101.9%	⊘	101.5%	⊘	⊘	⊘	53.5%	
<b>Objective Increase customer base &amp; products and services</b>	108.4%	⊘	101.5%	⊘	⊘	⊘	42.3%	
<b>Objective Provide quality &amp; innovative customer service</b>	91%		⊘		⊘		87%	
<b>Perspective Finance</b>	80.9%	112%	80.3%	106%	100%	120%	83.2%	
<b>Objective Maximize revenues &amp; returns from core and new business</b>	84.4%	⊘	⊘	⊘	⊘	⊘	⊘	
<b>Objective Optimize capital &amp; operating expenditure</b>	75%	112%	112%	93.5%	100%	120%	100%	
<b>Perspective Internal Process</b>	77.3%	72%	100%	113%	84.5%	126%	57.6%	
<b>Objective Build effective organization governance</b>	⊘	⊘	⊘	79%	⊘	⊘	44.3%	
<b>Objective Improve &amp; automate efficient processes</b>	77.3%	72%	100%	130%	84.5%	126%	111%	
<b>Perspective People</b>	105.5%	136.5%	78.5%	108.7%	125%	83.8%	79.7%	
<b>Objective Attract &amp; retain &amp; develop capable talent</b>	100%	73%	75%	125%	125%	75%	75%	
<b>Objective Build a performance driven culture</b>	111%	200%	82%	100.5%	125%	86.7%	82%	

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



**Detailed Scorecard**

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

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

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

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

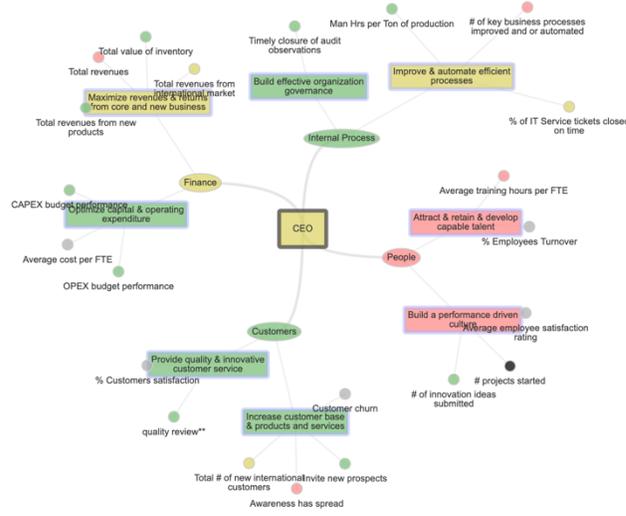
# Analyze

You can analyze your data by different dimensions.



☰
KPIs
Projects
CEO
The Solution Crowd
Oct
2022
👤

### Nodes



x  
 CEO  
 All perspectives  
 2022 - Sep / Q3  
 KPIs  
 Projects  
 Milestones  
 Users  
 Owners  
 Feedback  
 Competency  
 Sub-teams  
 Org  
 Perspectives  
 Objectives  
 Teams  
 Structured  
 Simplify  
 Update  
[Help](#)

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

☁
KPIs
Projects
CEO
Teams
The Solution Crowd
Mar / Q1
2022
🌐
🔑
🔍
👤

### Analyze

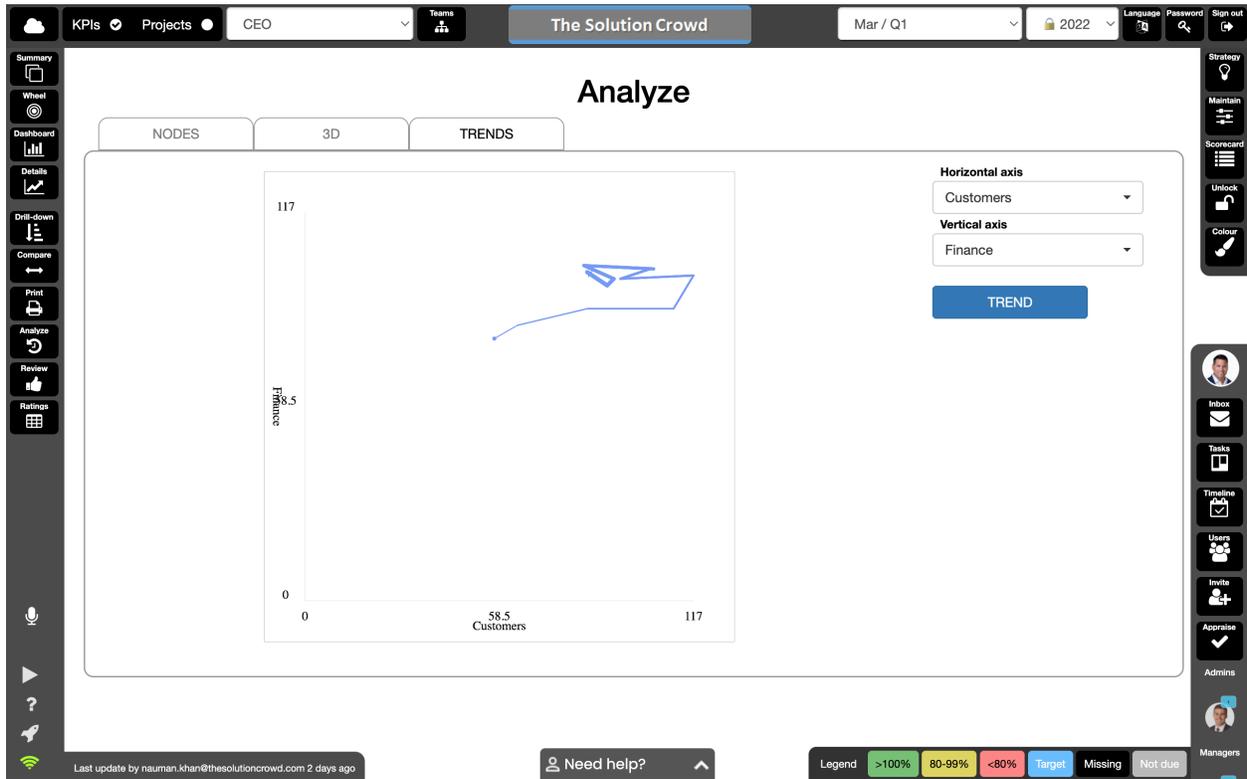
NODES | 3D | TRENDS

2022  
 Project Scores  
 Perspectives  
 Objectives  
 KPIs  
 Milestones  
 Dots  
 Refresh

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

Last update by nauman.khan@thesolutioncrowd.com 2 days ago  
 Need help?

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



Compare how two items are trending over the year.



The screenshot shows the 'Drill Down' feature in Kippy. At the top, the perspective is set to 'CEO' and the objective is 'Customers | Increase customer base & products and services' with a 108.4% score. Below this, a table lists KPIs for the CEO, including '# of new product int', 'Awareness has sp', 'ddfgag', 'Invite new prospects', and 'Total # of new international customers'. A tooltip for '# of new product int' explains that to increase revenue and sales, it is a strategic direction to add new products to existing sales offerings. Below the CEO section, the sub-team 'Business Support' is shown with a KPI 'Timely closure of audit observations'. A legend at the bottom right indicates score ranges: >100% (green), 80-99% (yellow), <80% (red), Target (blue), and Missing (grey).

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

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

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

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

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

## Staff performance

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



Individual Performance Summary

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

Appraiser

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

KPIs

Owned	Missing	Score
3	0	54.7%

Projects

Managed	Missing	Avg. Var.
1	0	-1

Milestones

Owned	Missing	Avg. Var.
1	0	0

Appraisal

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

Competencies

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

History

Notes for 2021

- owner@thesolutioncrowd.com Jul 2021  
Please show files to support this KPIadqada
- owner@thesolutioncrowd.com Jul 2021  
Please note that I need more details about x

New note for Oct 2021

KPI Graphs

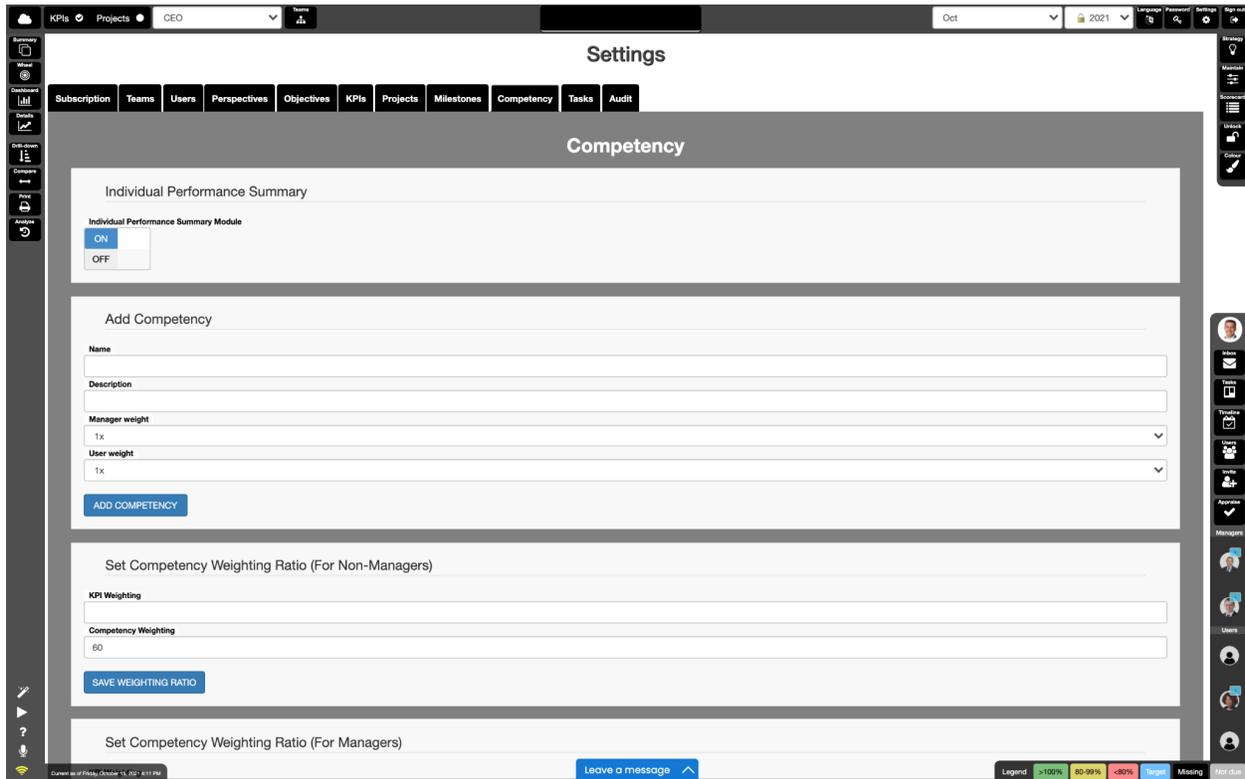
- Sales | Internal Process | Build effective organization governance | # OF NON-COMPLIANCE
- CEO | Customers | Provide quality & innovative customer service | quality review\*\*
- Sales | Customers | Increase customer base & products and services | # of customers with sales more than 1 Mill

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

# 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.



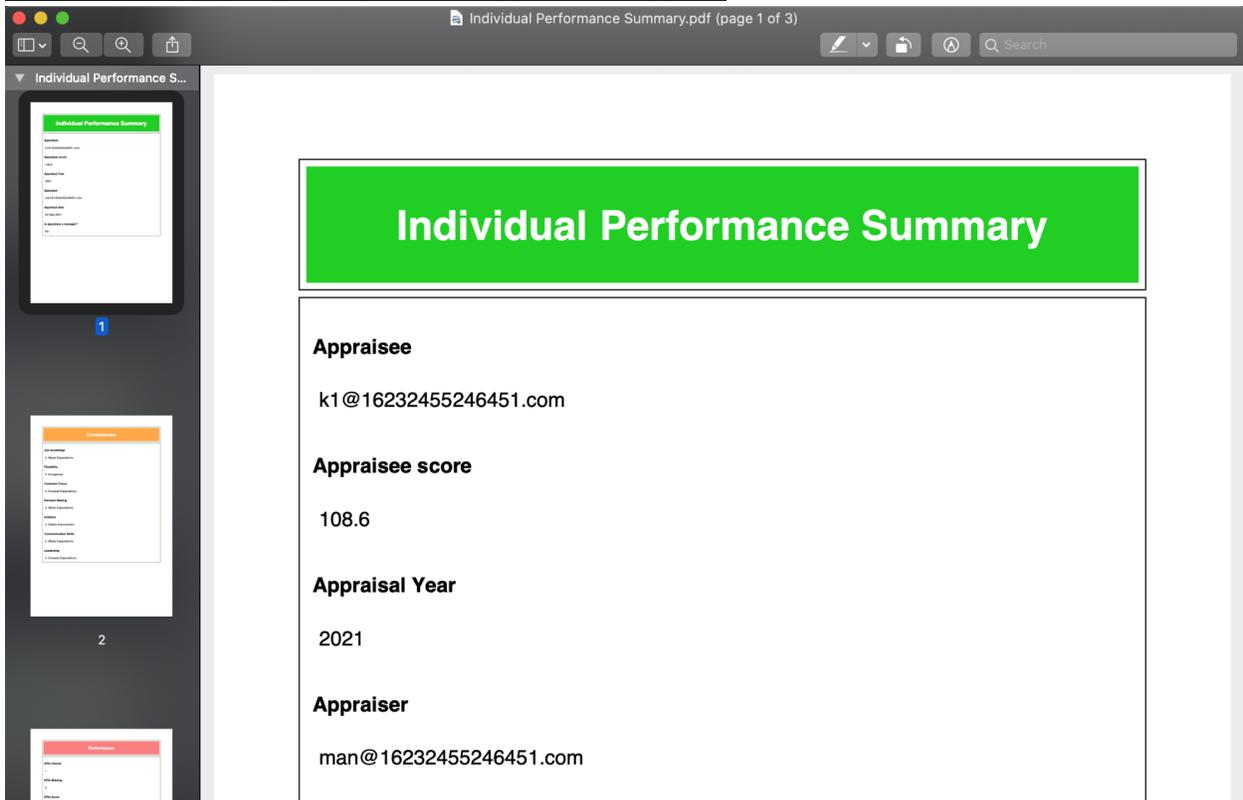
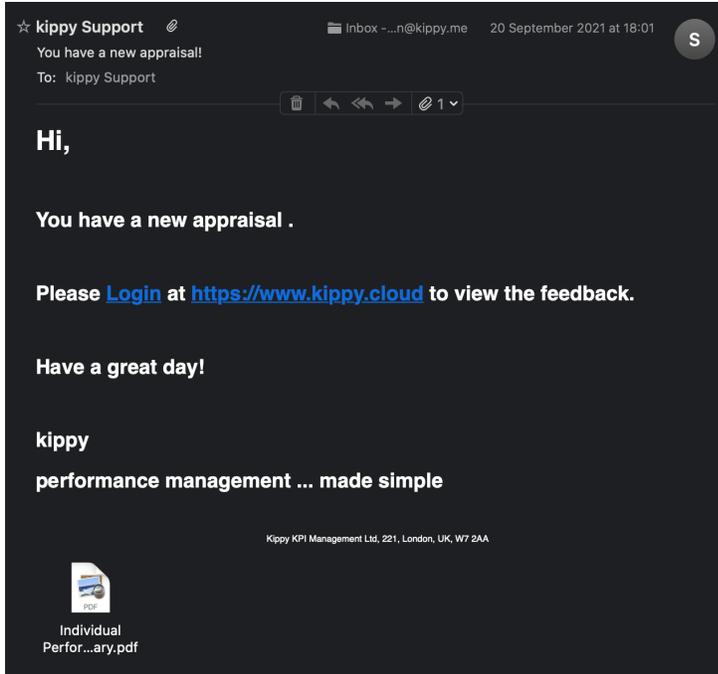
The screenshot displays the 'Settings' page in the Kippy application, specifically the 'Competency' section. The page is titled 'Settings' and has a navigation bar with tabs for Subscription, Teams, Users, Perspectives, Objectives, KPIs, Projects, Milestones, Competency, Tasks, and Audit. The 'Competency' tab is selected.

The main content area is titled 'Competency' and contains three sections:

- Individual Performance Summary:** A section with a toggle switch for the 'Individual Performance Summary Module'. The toggle is currently set to 'ON'.
- Add Competency:** A form with the following fields:
  - Name: [Text input]
  - Description: [Text input]
  - Manager weight: [Dropdown menu, currently set to '1x']
  - User weight: [Dropdown menu, currently set to '1x']A blue 'ADD COMPETENCY' button is located below the form.
- Set Competency Weighting Ratio (For Non-Managers):** A section with two input fields:
  - KPI Weighting: [Text input]
  - Competency Weighting: [Text input, currently set to '60']A blue 'SAVE WEIGHTING RATIO' button is located below the form.

At the bottom of the page, there is a 'Set Competency Weighting Ratio (For Managers)' section, which is partially visible. A 'Leave a message' button is also present at the bottom center. The footer of the page shows a legend with color-coded boxes for performance levels: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

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



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



**New note for Oct 2021**

**A** **B** **U** **I**

☰ ☰ ☰ ☰ ☰ ☰ ☰

@manager Please can you clarify appraisal rating for ...

✉

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

## Individual Performance Summary

**Team | Role | Appraiser**

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

---

**Appraisee**

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

KPIs			Projects			Milestones		
Owned	Missing	Score	Managed	Missing	Avg. Var.	Owned	Missing	Avg. Var.
1	0	60%	0	0	n/a	0	0	n/a

**Appraisal**

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

# Self appraisals

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

**Appraisals**

Team | Role | Appraisee  
CEO | Admin | Bob Smith

Appraisee

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

KPIs

Owned	Missing	Score
0	0	n/a

Projects

Managed	Missing	Avg. Var.
0	0	n/a

Milestones

Owned	Missing	Avg. Var.
0	0	n/a

Appraisal

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

Competencies

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

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

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

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



# 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)



### Employee Rating Report

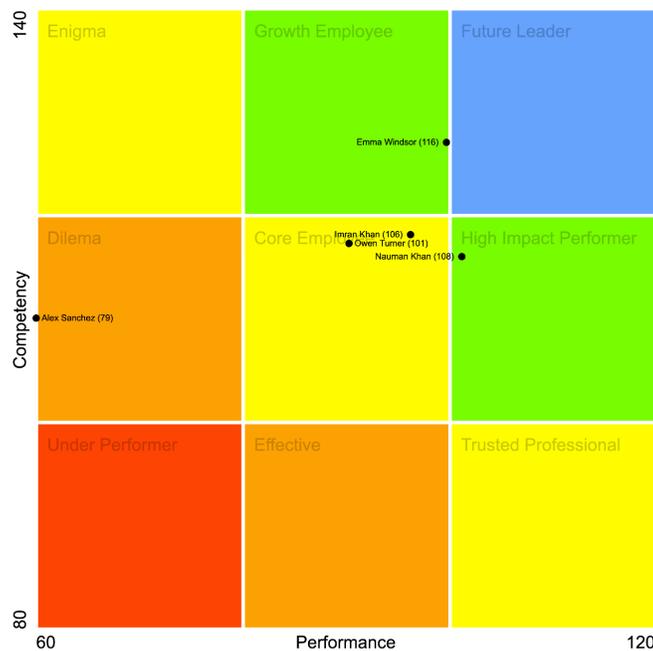
Employee email	Is manager	KPI Score	Comp Score	Avg	Weighted Avg	Rating
lina@thesolutioncrowd.com	Yes					
alex.sanchez@thesolutioncrowd.com	No	0		0	0	1 (Poor <60)
nesrain@thesolutioncrowd.com	Yes					
ake.simmons@thesolutioncrowd.com	No	50		50	50	1 (Poor <60)
mike@thesolutioncrowd.com	Yes		85	85	85	3 (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)

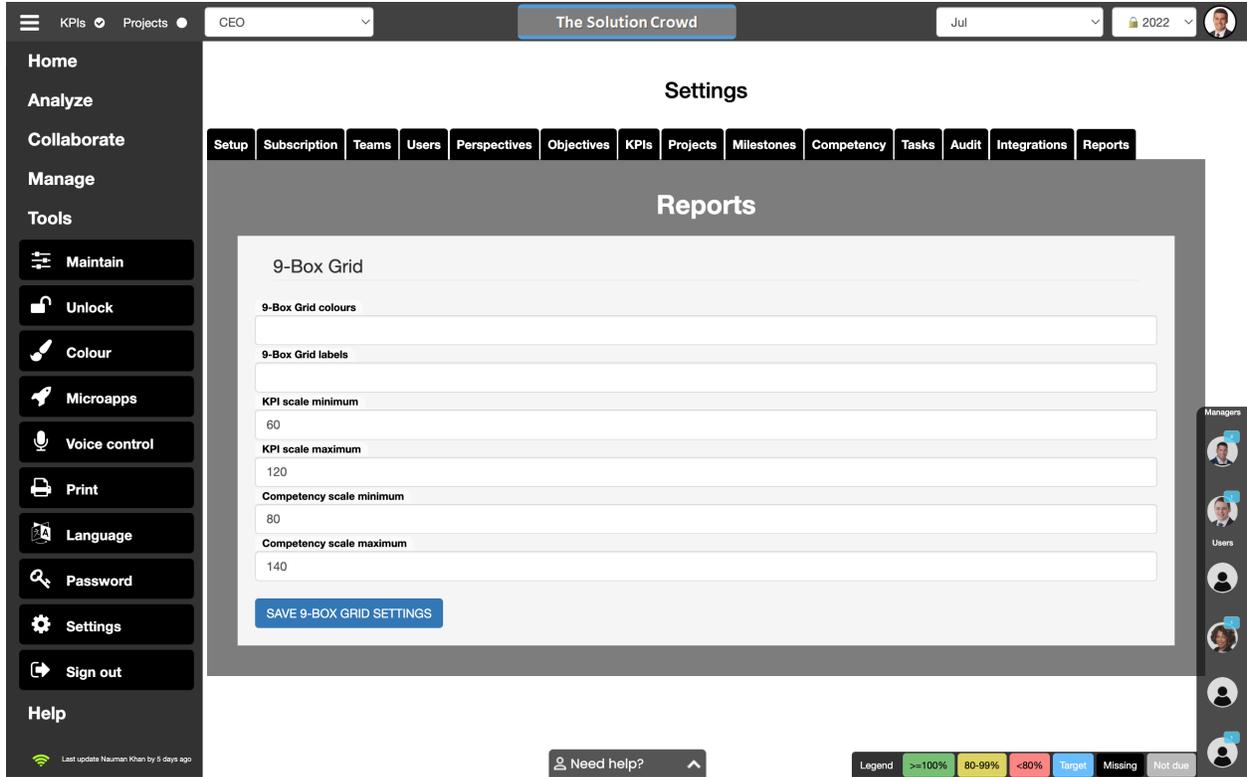
Generated: Fri Oct 15 15:38:54 UTC 2021

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



### The 9-Box Grid

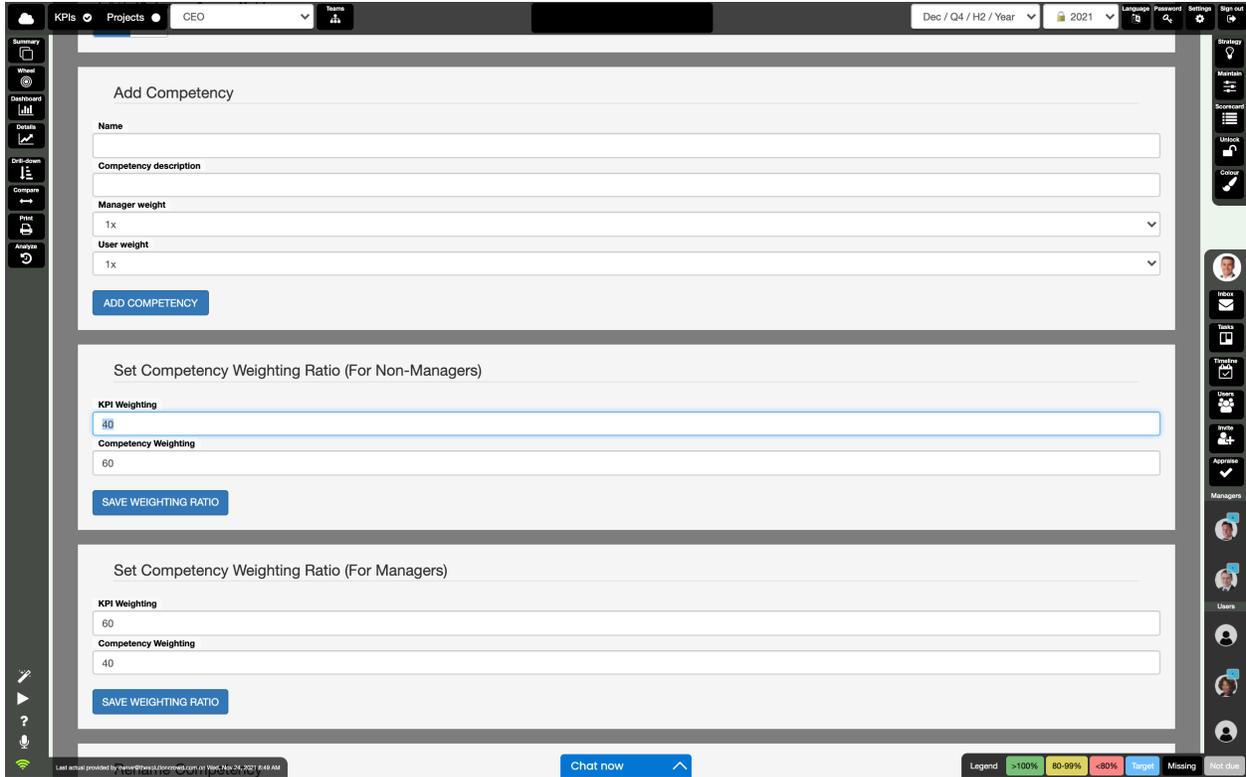




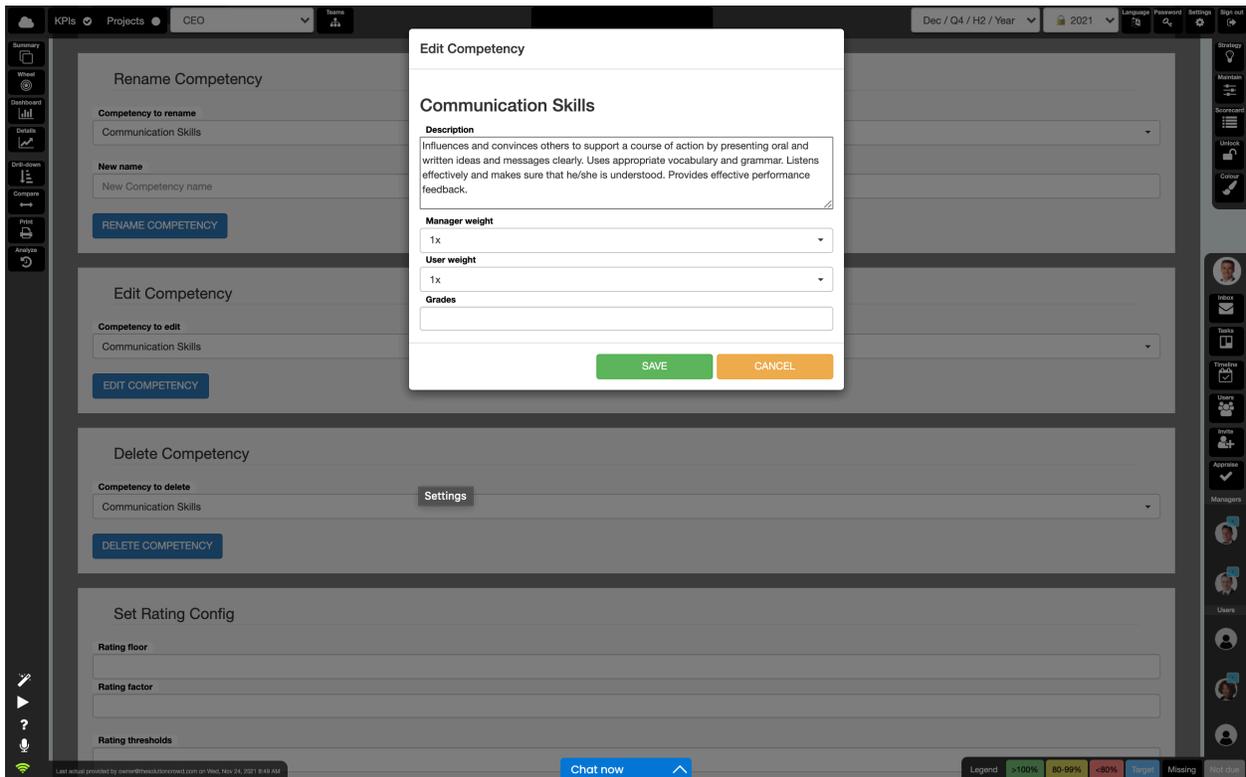
## Competencies, grades and weightings

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

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



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





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

### Set Rating Config

**Rating floor**

**Rating factor**

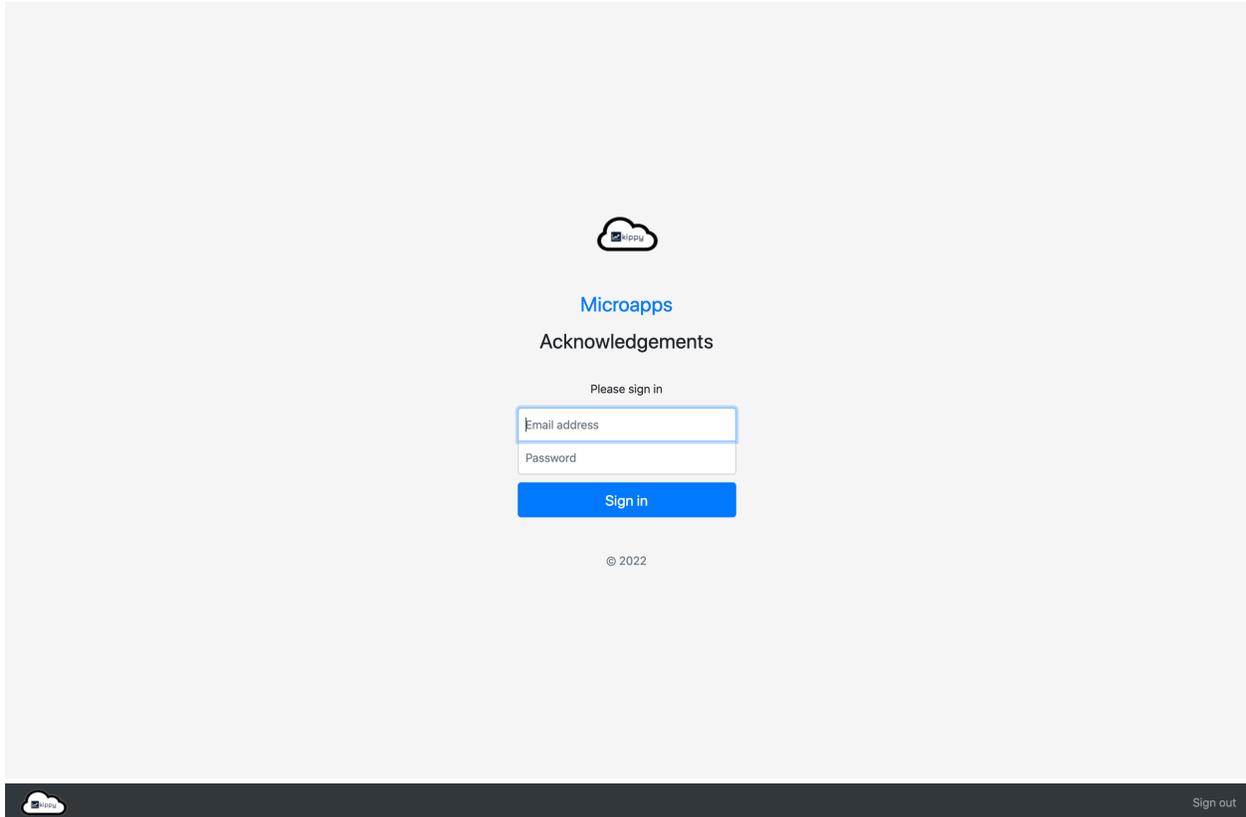
**Rating thresholds**

**Lock appraisals**  OFF

**SAVE WEIGHTING RATIO**

## Acknowledgements and 360-degree Feedback

Users can leave acknowledgements for other users.



### Select user to acknowledge

#### Users

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

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

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



Sign out

### Acknowledge

bob@exorg.com

Relation to employee

- Manager
- Peer
- Customer
- Direct report

Time spent with employee

- Daily
- Weekly
- Monthly
- Occasionally

Rating

★★★★★

Comment

Please leave a positive, concise and constructive note for the employee...

I want the employee to know I am the person who sent this acknowledgement

Save

Cancel

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

The screenshot shows the 'Acknowledgements' section of the Individual Performance Summary screen. The interface includes a top navigation bar with 'KPIs', 'Projects', 'Sales', and 'Teams' tabs, and a user profile 'exorg.com'. The main content area displays a list of seven acknowledgements, each with a star rating, a text comment, and a timestamp. The acknowledgements are:

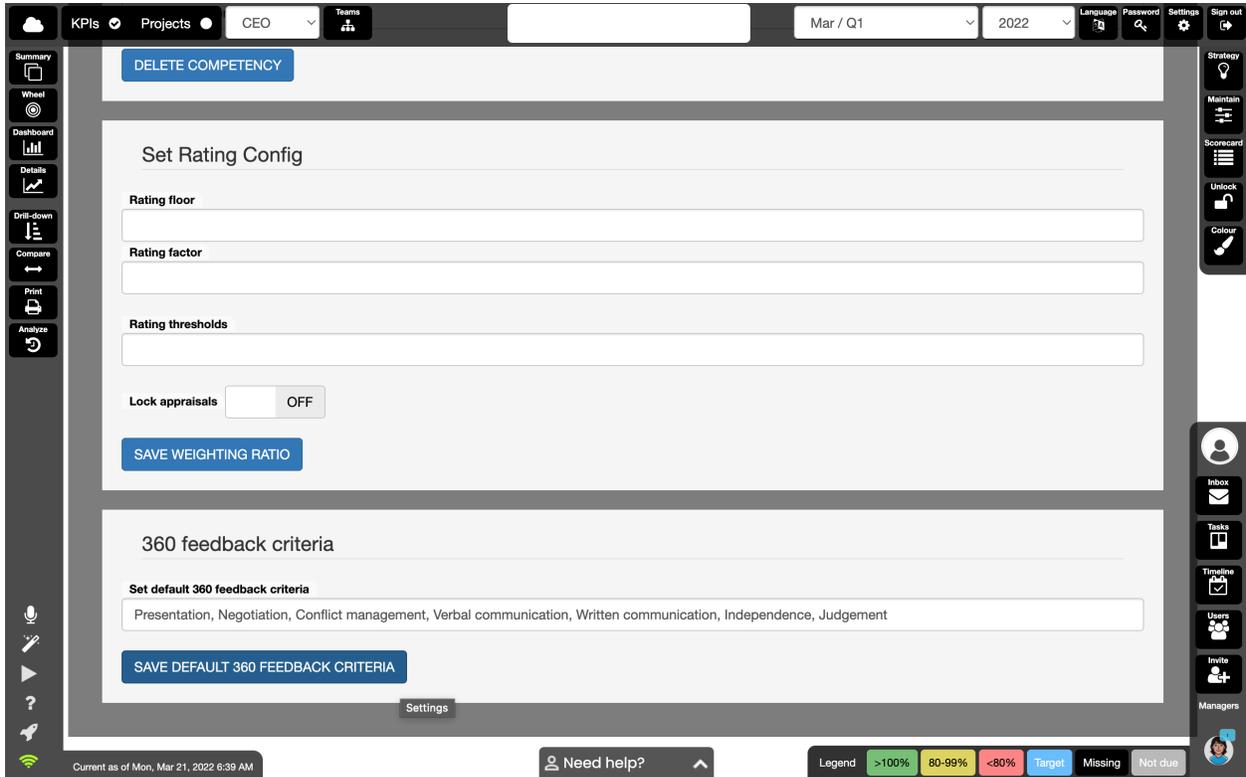
- ★★★★★ Your insights and instruction are always appreciated. However, I feel that I perform and learn better when you allow me to figure out how to achieve the target on my own. 15 second ago anonymously
- ★ Sometimes the amount of tasks and responsibilities on my plate feel overwhelming. I would be 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

At the bottom, there are 'KPI Graphs' for various categories like 'Sales | People | o3 | k4', 'Sales | Finance | o2 | k3', 'Sales | Process | o4 | k5', and 'Sales | Finance | o2 | k2'. A legend indicates performance levels: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

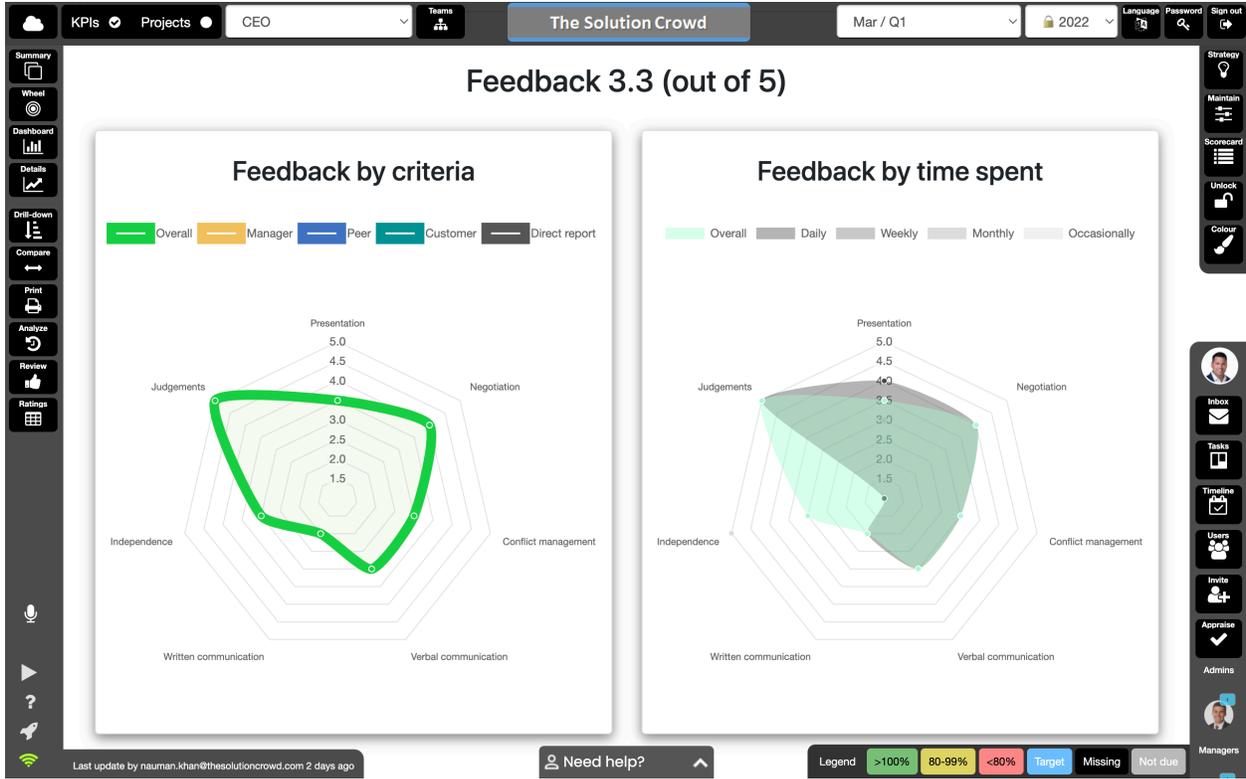


The feedback can also be left via the main kippy app clicking on a user's avatar.

The feedback criteria are configurable in the setting screen.



The feedback is summarized in interactive radar graphs per employee.



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

**Employee Rating Report**

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

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



# 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 - <a href="mailto:nauman.khan@thesolutioncrowd.com">nauman.khan@thesolutioncrowd.com</a> (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 - <a href="mailto:nauman.khan@thesolutioncrowd.com">nauman.khan@thesolutioncrowd.com</a> (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 a mobile application interface for 'The Solution Crowd'. A modal window titled 'Users related to this board' is open, showing three categories of users:

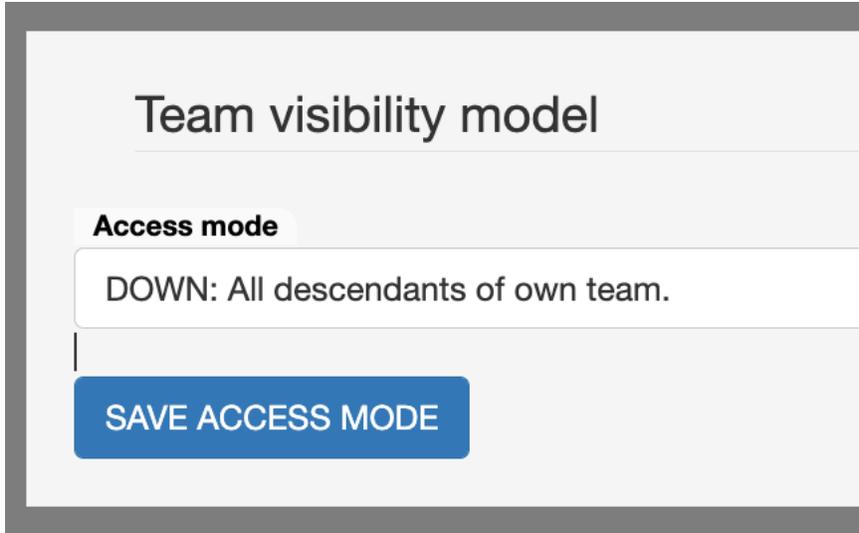
- Admin:** One user, 'owner@thesolutioncrowd.com (CEO)', with a notification badge of 2.
- Managers:** Two users, 'nauman.khan@thesolutioncrowd.com (CEO)' and 'sari@thesolutioncrowd.com (CEO)', with notification badges of 1.
- Users:** Three users, 'bob@thesolutioncrowd.com (CEO)', 'hi@thesolutioncrowd.com (CEO)', and 'test@thesolutioncrowd.com (CEO)', with a notification badge of 1.

The background interface includes a navigation menu on the left, a top bar with 'KPIs', 'Projects', 'Sales', and 'Teams', and a right sidebar with various icons. A table on the right shows 'Average score' and 'Rating' for various items.

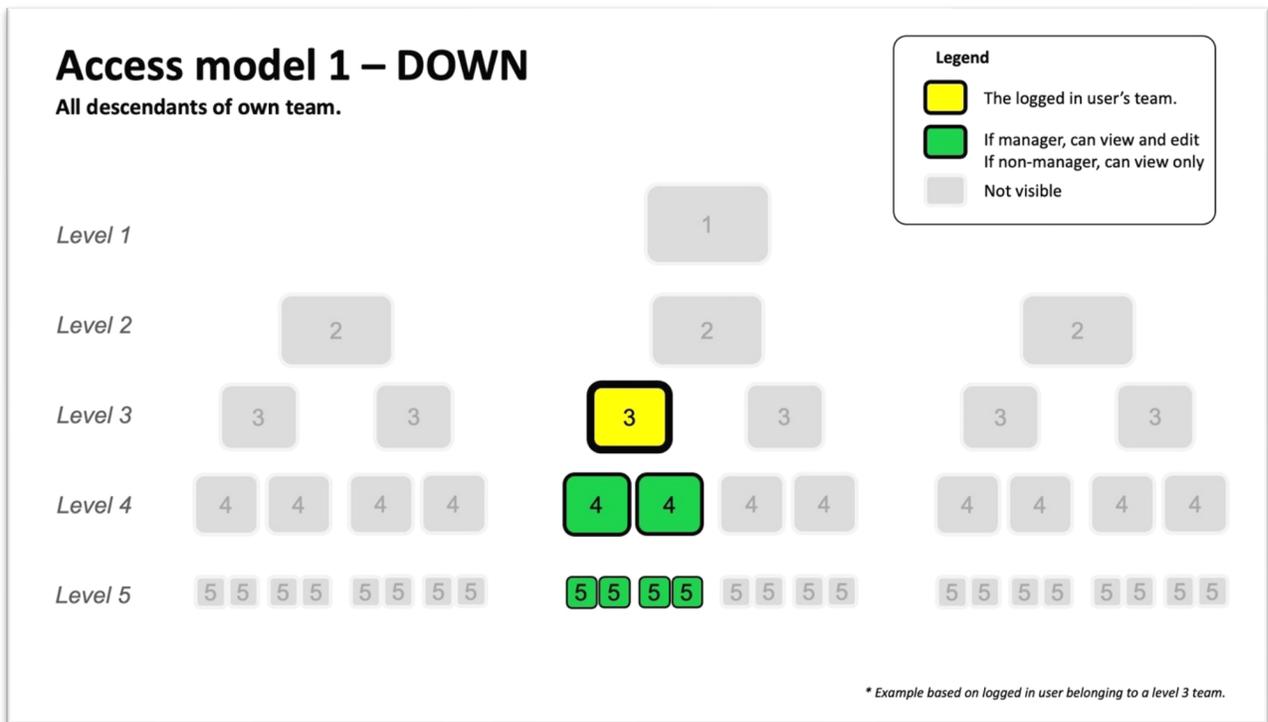
Average score	Rating
0	1 (Poor <60)
50	1 (Poor <60)
85	3 (Good 80-100)
87	3 (Good 80-100)
90	3 (Good 80-100)
91	3 (Good 80-100)
94	3 (Good 80-100)
98	3 (Good 80-100)
102	4 (Excellent >100)
119	4 (Excellent >100)
125	4 (Excellent >100)
225	4 (Excellent >100)

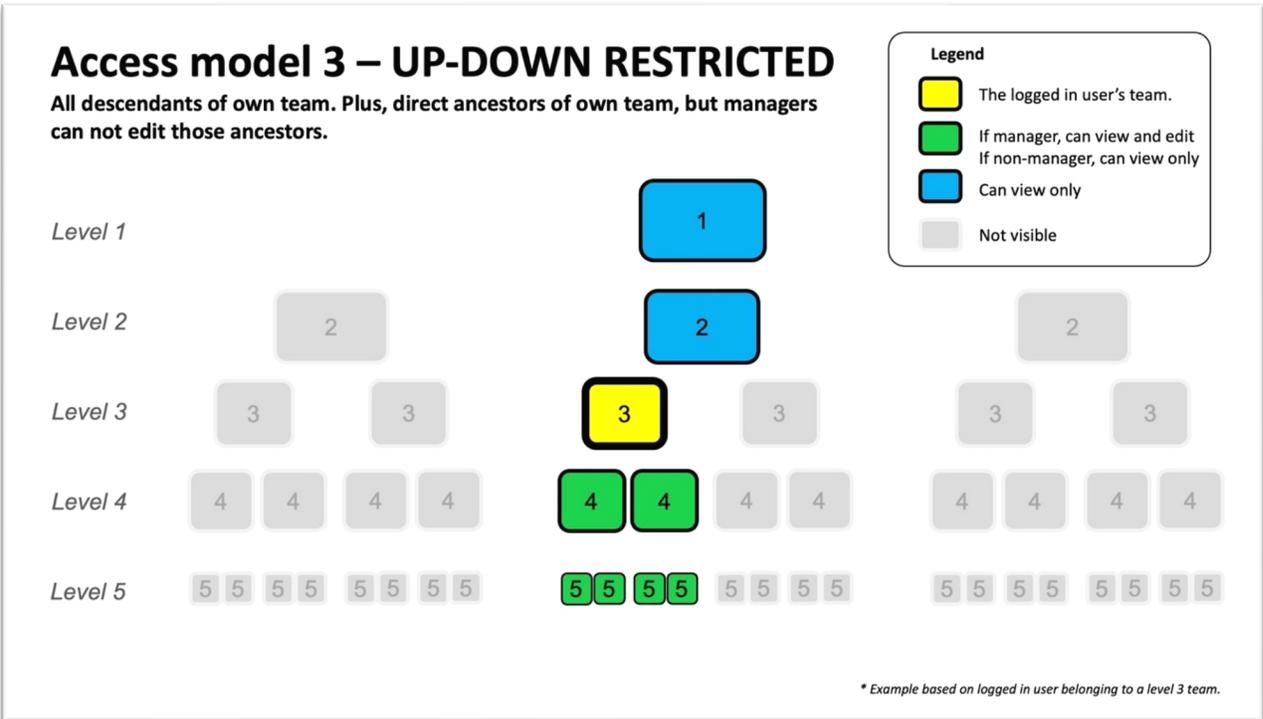
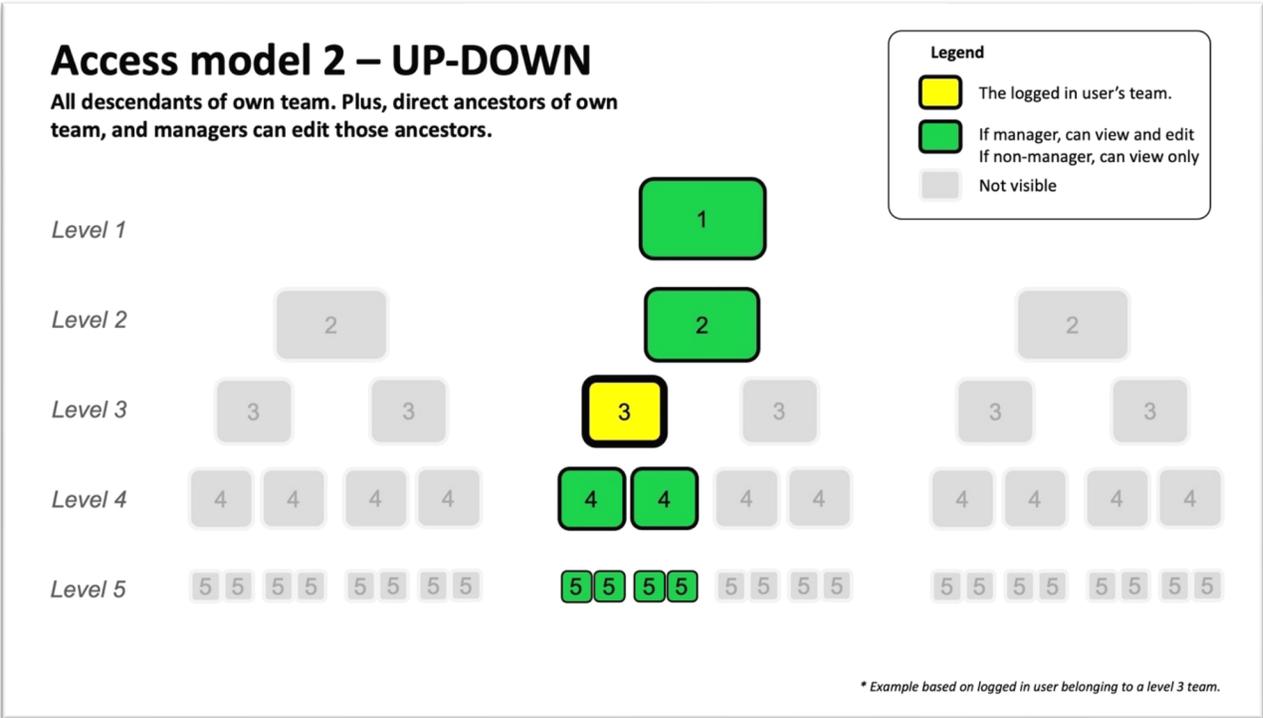
Managers have additional screen to perform HR functions.

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



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



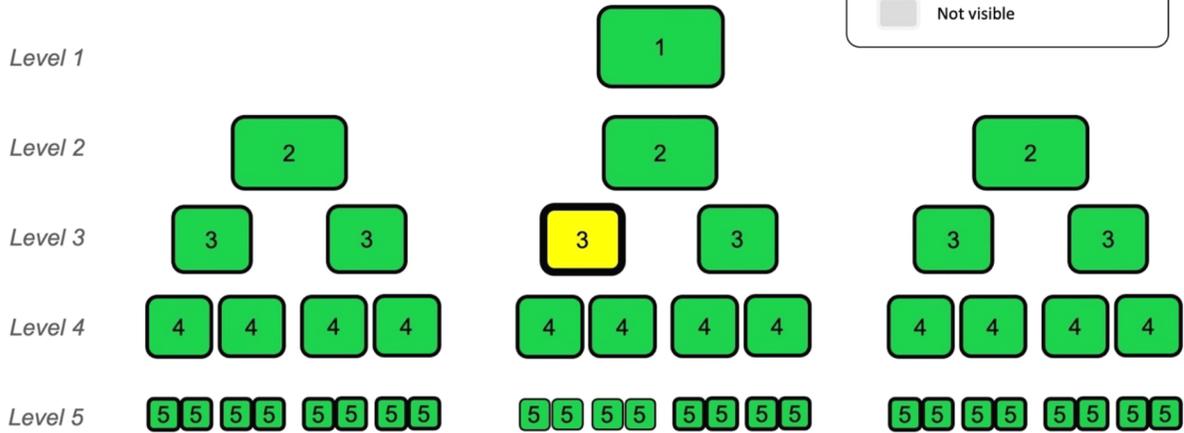


## Access model 4 – FULL

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

**Legend**

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



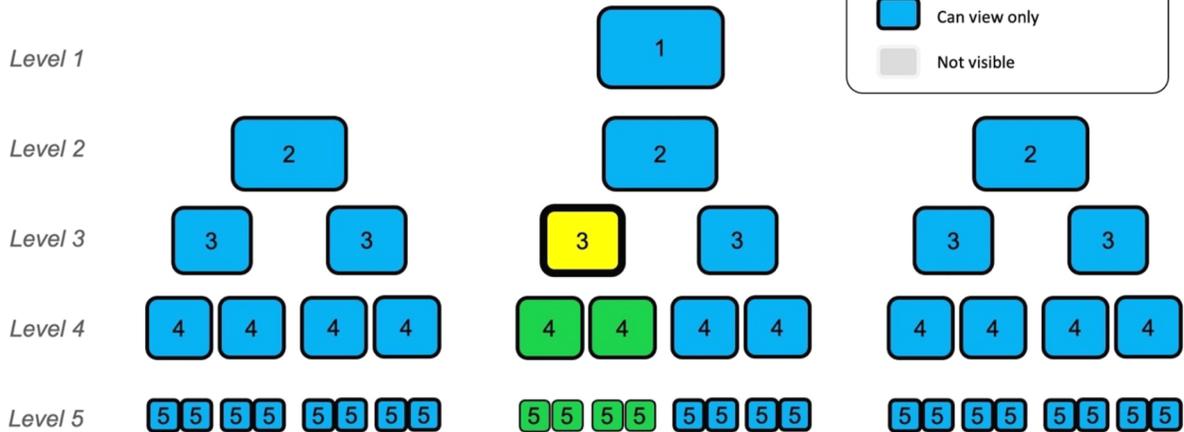
\* Example based on logged in user belonging to a level 3 team.

## Access model 5 – FULL RESTRICTED

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

**Legend**

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



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



## Auditing

Every change is automatically audited in an immutable log.

System owners can review the system-wide audit log.

The screenshot shows the 'Settings' page with the 'Audit' tab selected. The 'Team Audit Log' displays the following entries:

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

Additional UI elements include a top navigation bar with 'KPIs', 'Projects', and 'CEO' dropdowns; a left sidebar with navigation icons; a right sidebar with user management tools; and a bottom status bar with a legend for performance metrics (>100%, 80-99%, <80%, Target, Missing, Not due).

An audit log of changes to each KPI and Project is also visible.



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

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

### Details

Perspective | Objective | KPI  
Customers | o1 | k1

**Details**

**Perspective**  
Customers

**Objective**  
o1

**KPI Name**  
k1

**Owner**  
u

**Weight**  
1x

**Unit**

**Direction**  
Increase is better

**Frequency**  
Monthly

**Cumulative**  
Yes

**KPI Targets and Actuals graph**

**KPI Targets and Actuals table**

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

1x : Increase is better : Cumulative : u

**History**

**Audit Log**

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

m@4biun2022.com

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

Rich text editor with bold, italic, link, and image icons.

Need help?

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

Admins, Users

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



History

Audit Log



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

---



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

---



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

---



Every appraisal is logged.



Home Analyze Collaborate

Inbox Tasks Timeline Users Invite Appraisals

Manage Tools Help

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

javascript;

Ship

KPIs Projects u

Expectations

Trial expires in 14 days. Click here to subscribe.

CANCEL SAVE COMPETENCIES

History

Audit Log

m@4bjun2022.com

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

Sat, Jun 4, 2022 7:33 AM

m@4bjun2022.com

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

2022

KPI Graphs

Need help?

rs | o | k | 1

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

Admins Users

## Change freezes and exemptions

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

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

**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



# Kippy – Features

The screenshot displays the Kippy software interface. A modal window titled "Add actual submission rule" is open, showing a form with two input fields: "Range" (containing "Fri, October 15, 2021 @ 00:00 - Fri, October 22, 2021 @ 00:00") and "Reason" (empty). Below the form are "CANCEL" and "ADD ACTUAL SUBMISSION RULE" buttons. The background shows a table of submission rules and a sidebar with navigation options.

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

Legend >100% 80-98% <80% Target Missing Not due



# 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.

The screenshot shows the 'Settings' page in Kippy. The 'Setup' section is active, displaying instructions for 'Assisted setup' and 'Quick KPI Setup'. The 'Quick KPI Setup' section includes a table for adding KPIs.

	Approved	Objective *	KPI Name *	Direction *	Weight *	Frequency *	Cumulative
1	<input checked="" type="checkbox"/>	Increase customer base & products and services	# of new product introduced	Increase is better	3x	Monthly	Yes
2	<input checked="" type="checkbox"/>	Increase customer base & products and services	Awareness has spread	Increase is better	1x	Quarterly	Yes
3	<input checked="" type="checkbox"/>	Increase customer base & products and services	Customer churn	Increase is better	1x	Yearly	Yes
4	<input type="checkbox"/>	Increase customer base & products and services	ddfgag	Increase is better	1x	Monthly	Yes
5	<input type="checkbox"/>	Increase customer base & products and services	FFGFHFGFGH	Decrease is better	2x	Monthly	Yes
6	<input checked="" type="checkbox"/>	Increase customer base & products and services	Invite new prospects	Increase is better	2x	Quarterly	Yes

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



## Kippy – Features

The screenshot displays the Kippy application interface. At the top, there's a navigation bar with 'KPIs', 'Projects', and 'CEO' selected. Below this is a table of KPIs with columns for ID, status, description, metric, trend, multiplier, frequency, and target. The table contains 10 rows of KPIs. Below the table are 'SAVE', 'CANCEL', and 'ADD ROW' buttons. Below that is an 'Import team' section with a yellow instruction box: 'Download the kippy template, populate it with all the data for this team and upload it all in one go.' Below this is a file upload area with a 'Choose file' button and an 'UPLOAD' button. The bottom of the screen shows a 'Leave a message' button and a legend for performance metrics: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not done (grey).

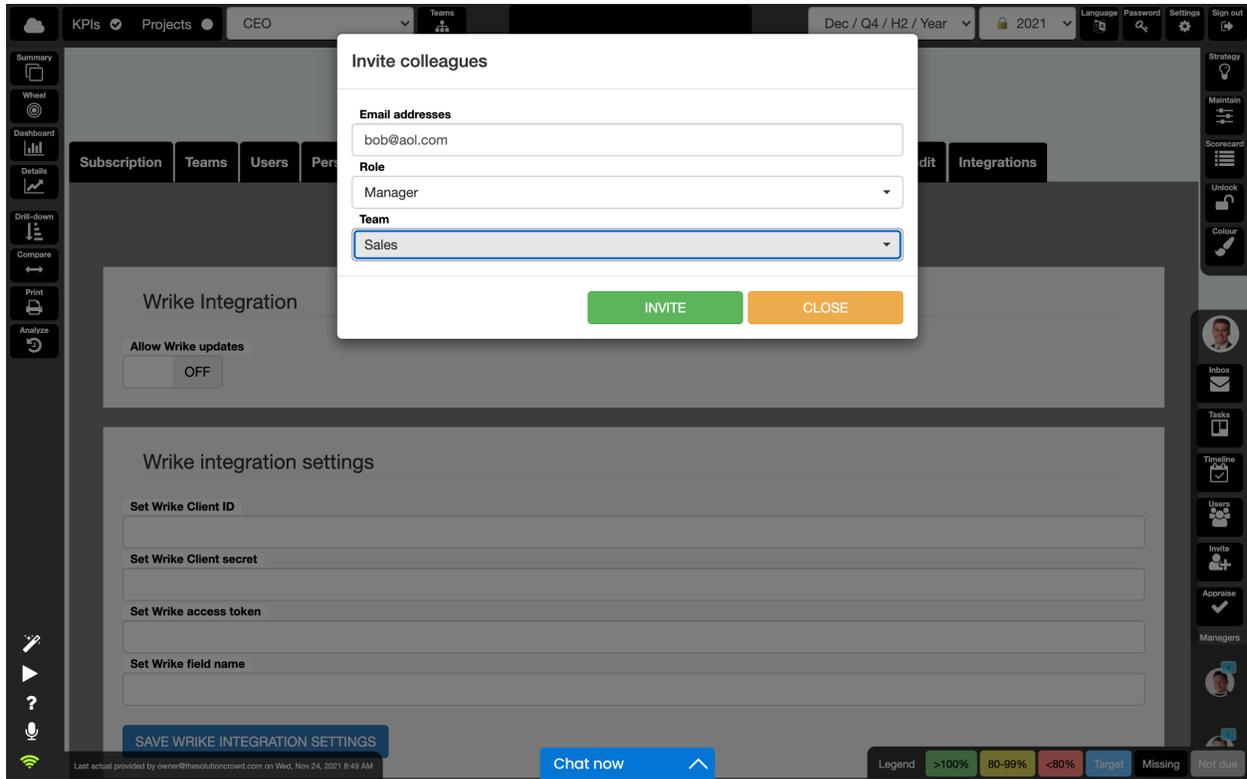
ID	Status	Description	Metric	Trend	Multiplier	Frequency	Target
21	<input type="checkbox"/>	Build effective organization governance	مخروص	Increase is better	1x	Semi-annual	No
22	<input checked="" type="checkbox"/>	Improve & automate efficient processes	# of key business processes improved and or automated	Increase is better	1x	Monthly	Yes
23	<input checked="" type="checkbox"/>	Improve & automate efficient processes	% of IT Service tickets closed on time	Increase is better	1x	Monthly	Yes
24	<input checked="" type="checkbox"/>	Improve & automate efficient processes	Man Hrs per Ton of production	Decrease is better	2x	Monthly	Yes
25	<input type="checkbox"/>	Improve & automate efficient processes	تصريف راد	Increase is better	1x	Monthly	Yes
26	<input checked="" type="checkbox"/>	Attract & retain & develop capable talent	% Employees Turnover	Decrease is better	1x	Semi-annual	Yes
27	<input checked="" type="checkbox"/>	Attract & retain & develop capable talent	Average training hours per FTE	Increase is better	1x	Monthly	Yes
28	<input type="checkbox"/>	Attract & retain & develop capable talent	Total area rented out	Increase is better	2x	Monthly	Yes
29	<input checked="" type="checkbox"/>	Build a performance driven culture	# of innovation ideas submitted	Increase is better	1x	Monthly	Yes
30	<input checked="" type="checkbox"/>	Build a performance driven culture	Average employee satisfaction rating	Increase is better	3x	Yearly	No

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

## User management

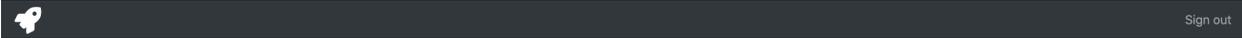
Simple in-app management

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.

View all users in one report.



## User Report

### Kippy Users ( 15 )

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

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

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

## Manage your own user profile

KPIs  Projects 
CEO
The Solution Crowd
Sep / Q3
2022
User Avatar

- ▼ Home
- 💡 Strategy
- 👤 Teams
- 📄 Summary
- 🎯 Wheel
- 📊 Dashboard
- 📈 Scorecard
- 📈 Details
- ⚙️ Maintain
- ▶ Analyze
- ▶ Collaborate
- ▶ Reports
- ▶ Tools
- ▶ Help

### My profile

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

---

**Name**

**Grade**

**Designation**

**Tree Depth**

[EDIT PROFILE](#)

---

**Voice-activated presentation mode**

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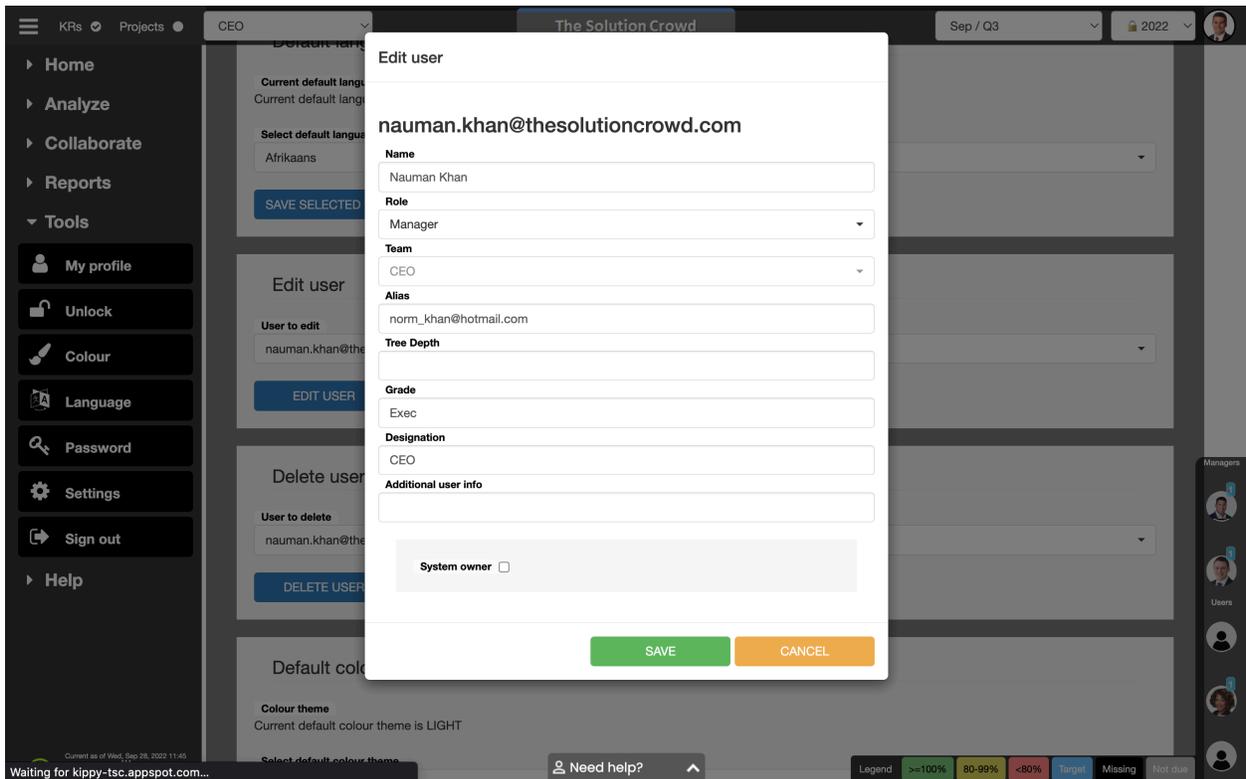
**Profile picture**  
 No file chosen

Need help?

Managers  
  
  
Users

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

## Manage profile of you 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:

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

Reminder S

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

## Reminder



Please update last months actuals for the following items

Team	Project Milestone or KPI	Name
CEO	KPI	Invite new prospects

Log in

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

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

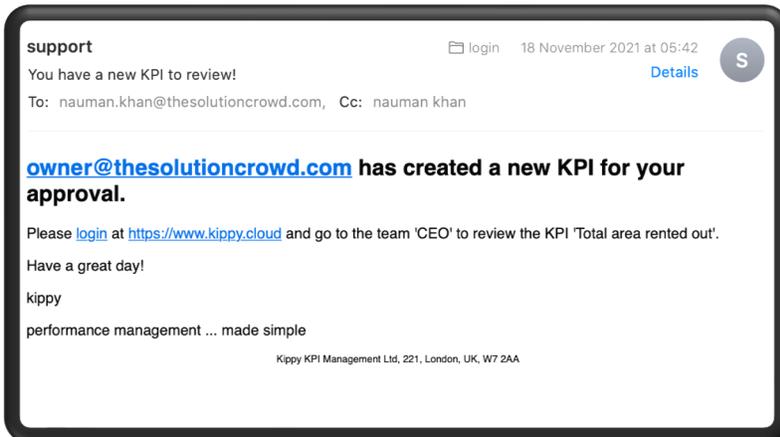
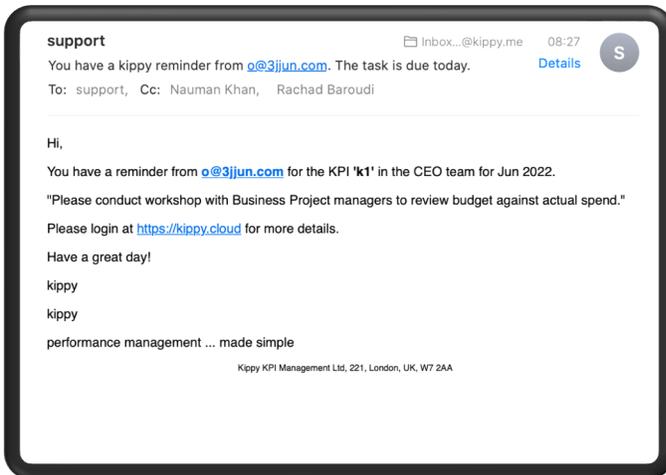
Kippy KPI Management Ltd, 221, London, UK, W7 2AA

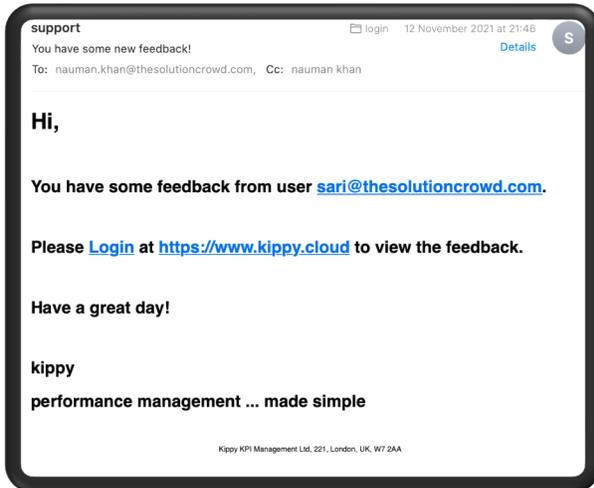
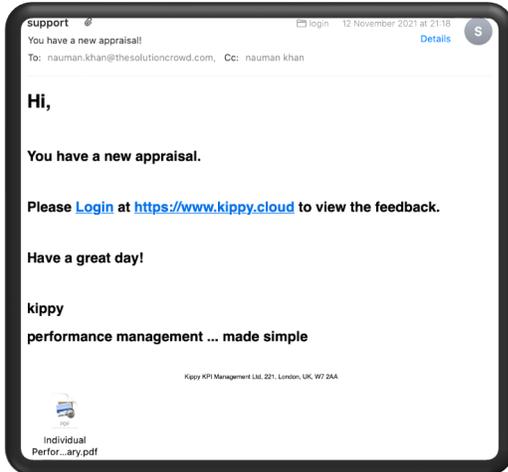


# Notifications

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

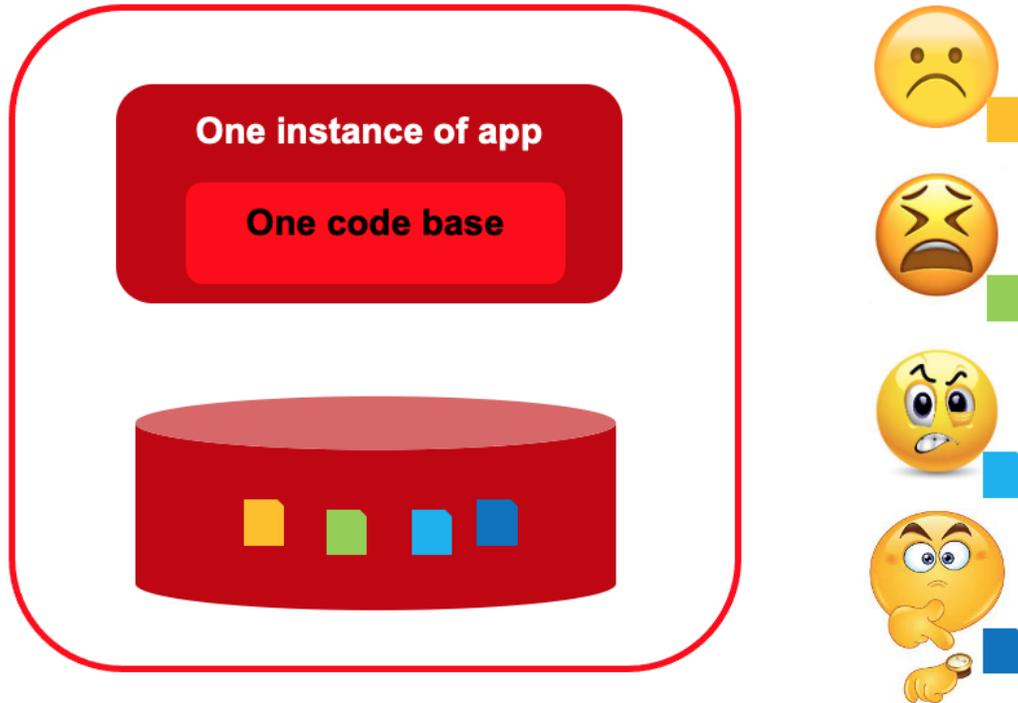
From a technical perspective, kippy is unique in that it does NOT provide a rigid Commercial off-the-shelf product.

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



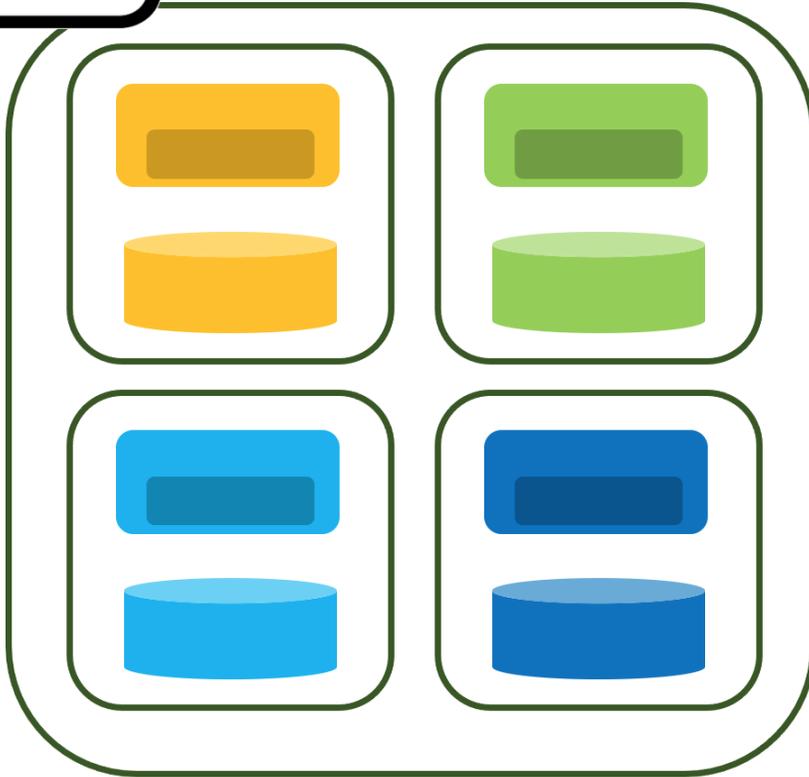
What does that mean for you? You have to put your requirements in a shared backlog for all your clients. You have to wait for the next major release. You have to do workarounds in your business processes to fit the constraints of their product.

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



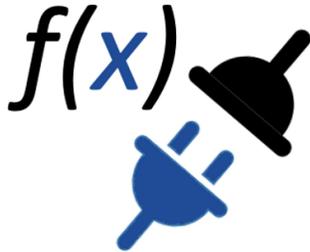
## Web APIs

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.

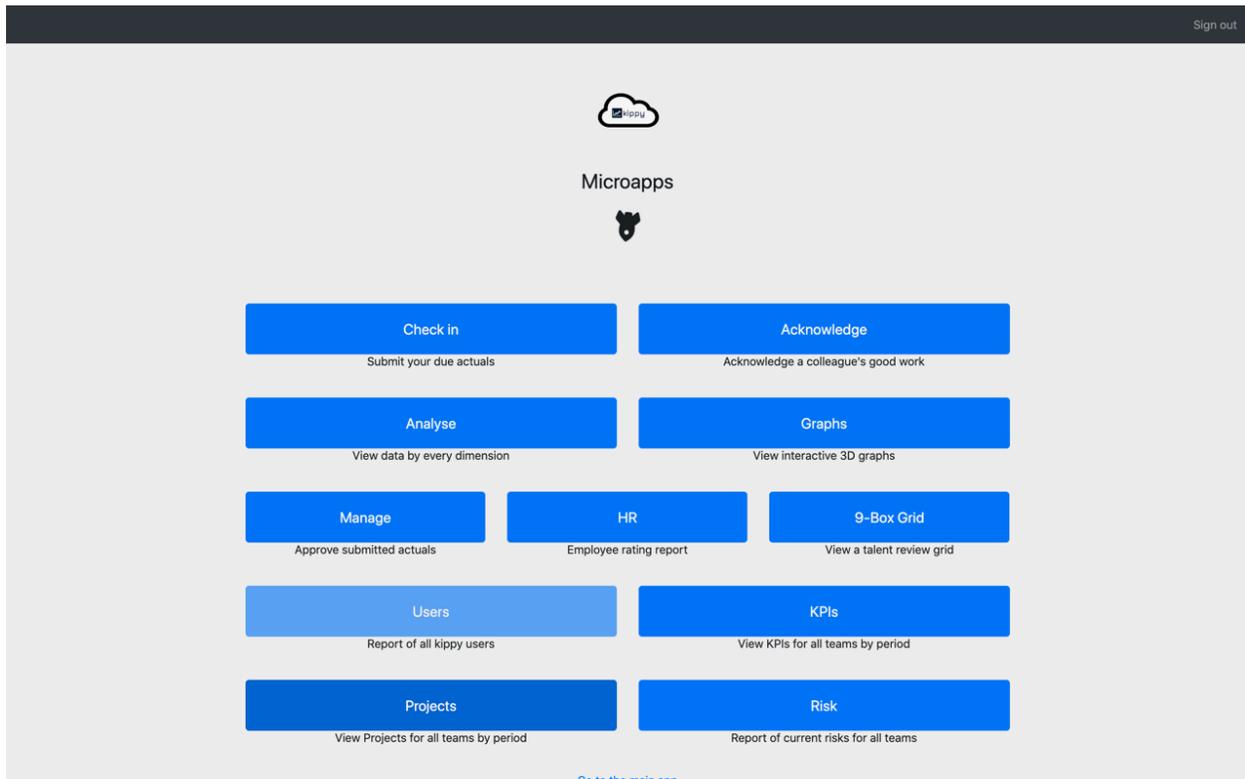
# Functions



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!

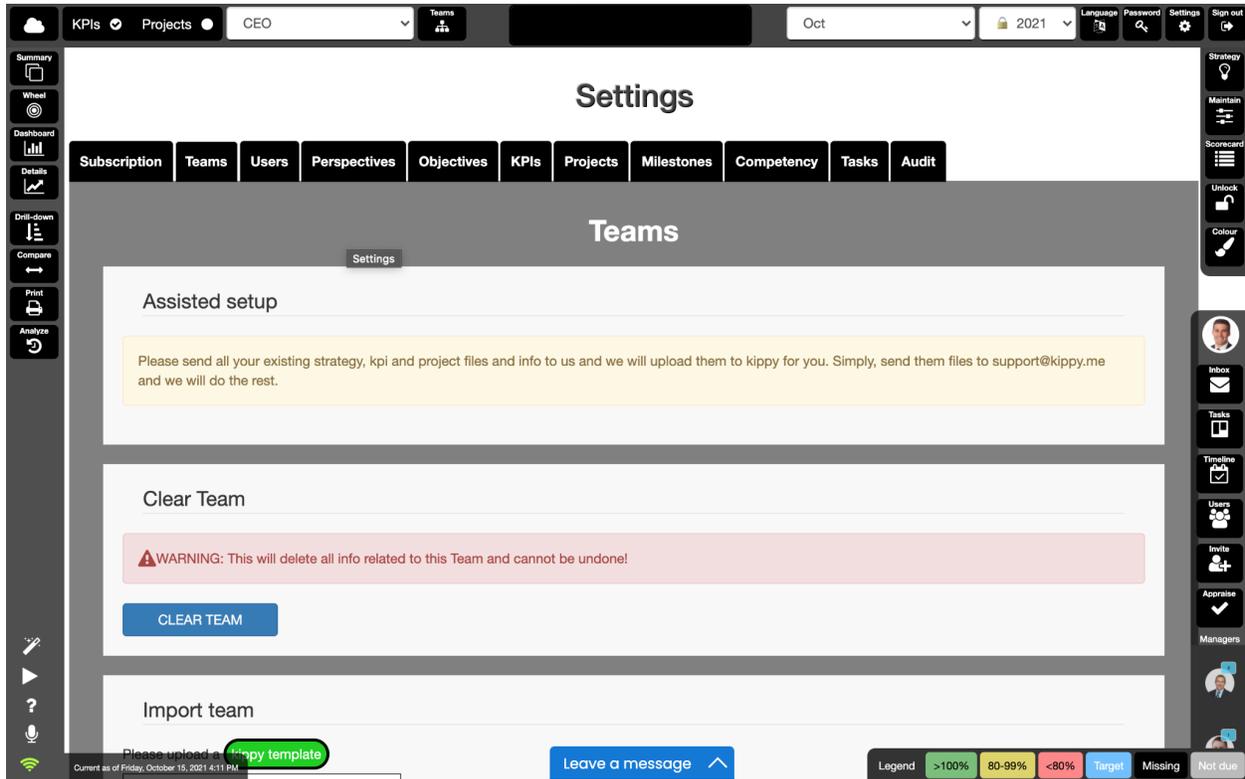
Your Kippy instance can be deployed to

- 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.

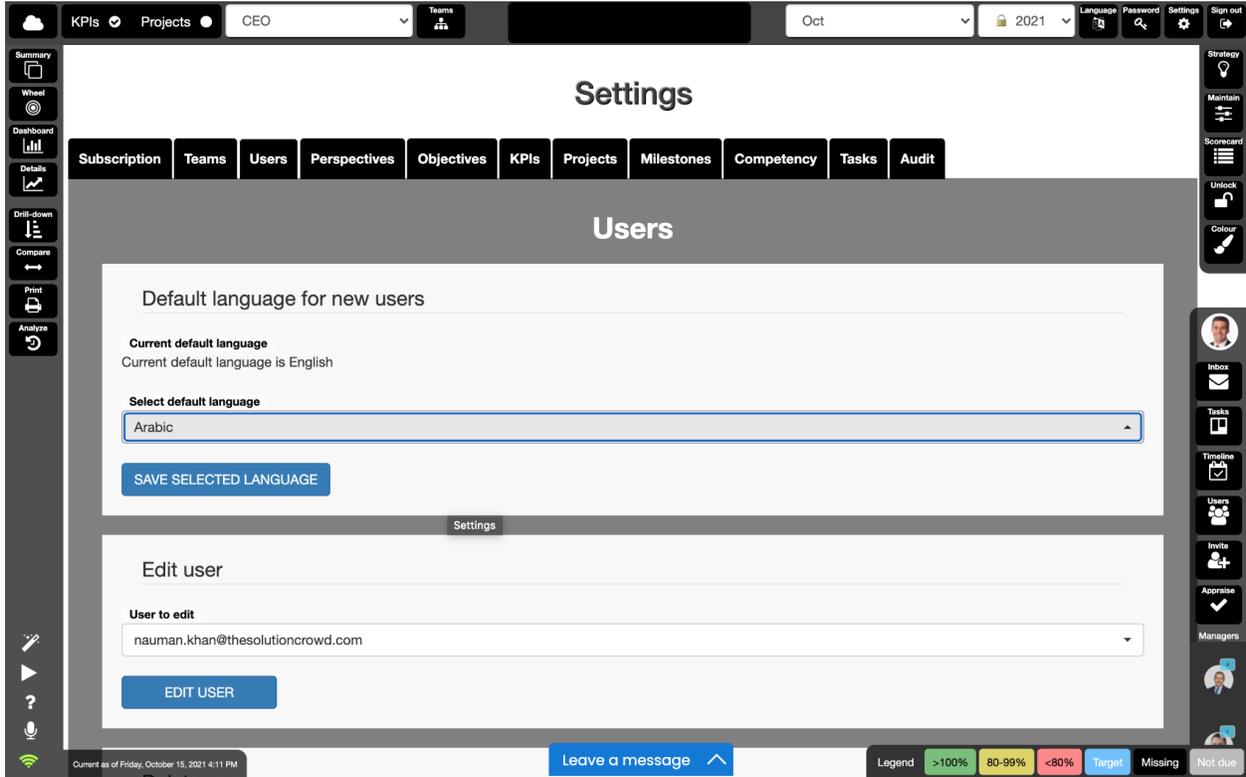


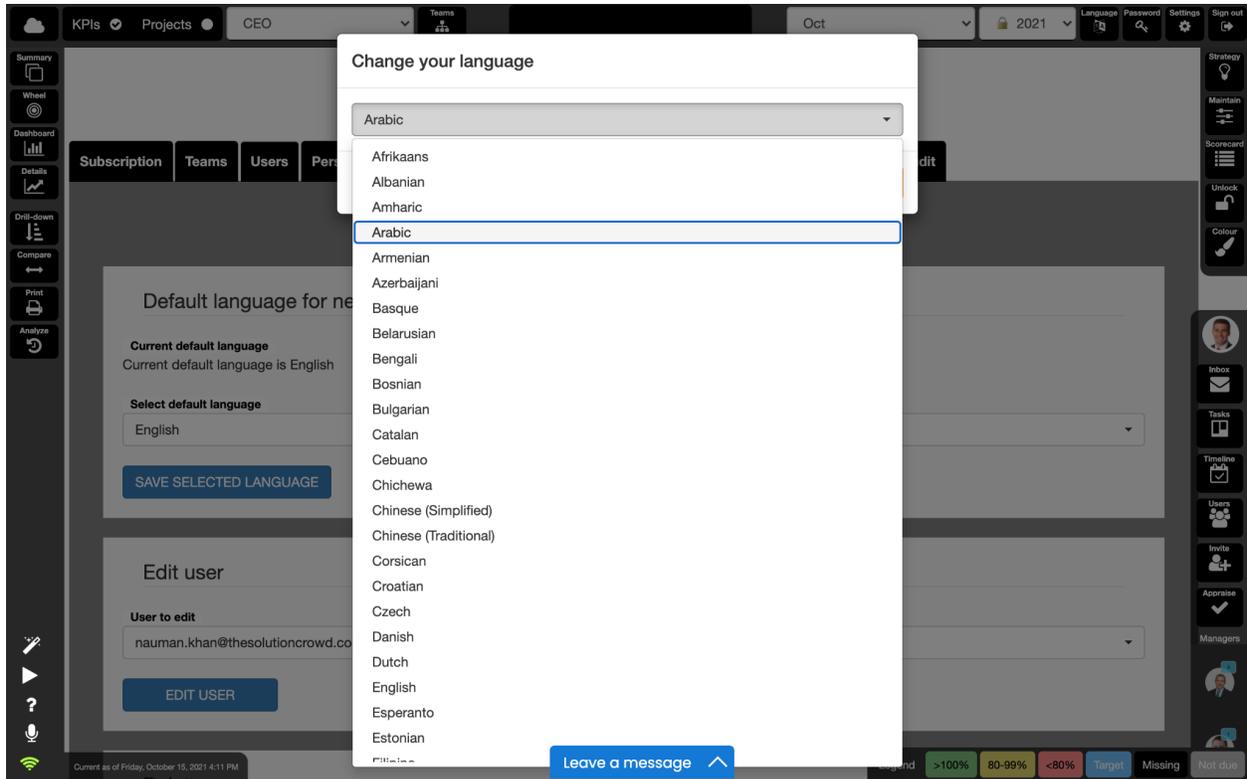
This includes

- 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)
- the list of values in each competency drop down in the appraisal screen
- inactivating KPIs and Teams by year.
- modifying the start of org reporting cycle e.g. 'January to December' becomes 'April to next March'.

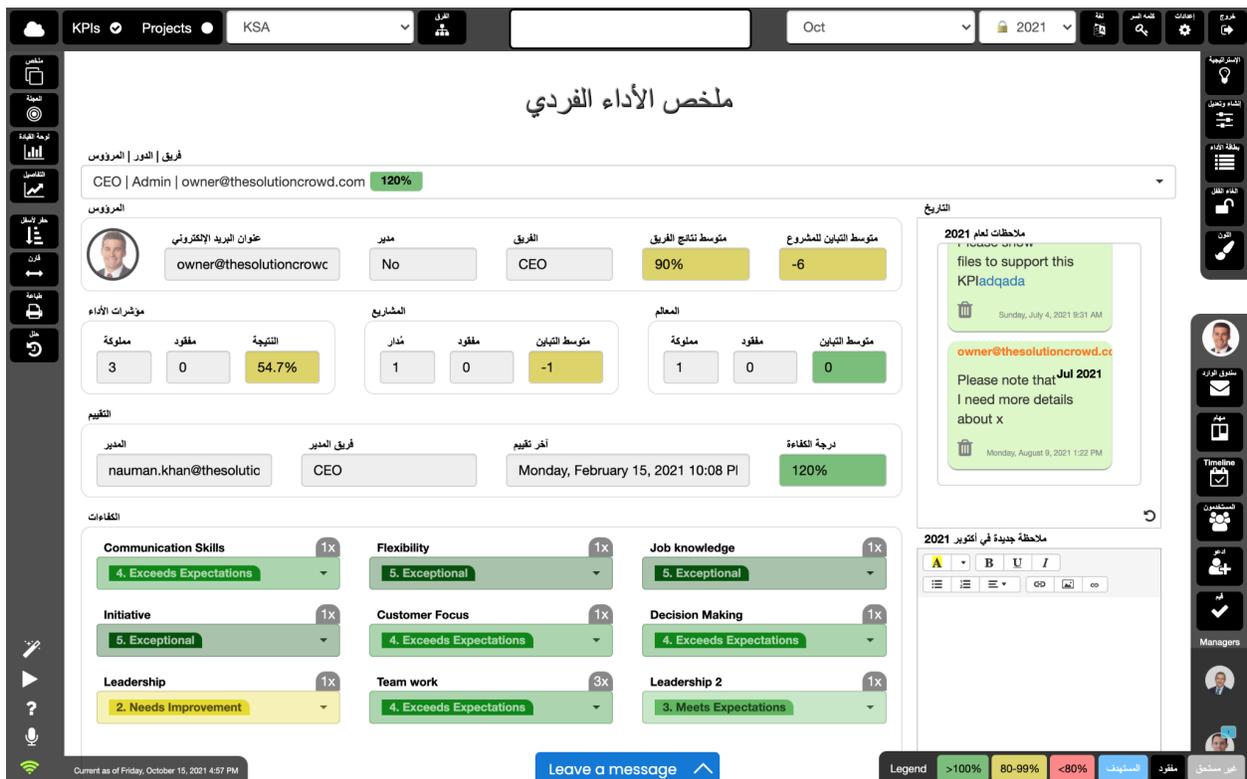
# Multi-language

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





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



KPIs Projects KSA
Oct 2021

## تفاصيل المؤشرات

المنظور | الهدف | المؤشر

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

المنظور: Customers

الهدف: بناء ثقافة مدفوعة الأداء

اسم المؤشر: عدد العملاء الذين تزيد مبيعاتهم عن مليون

الملف: nesrain@thesolutioncrowd.com

الاتجاه: Increase is better | الوزن: 3x

التكرار: Semi-annual | تراكمي: No

الوحدة: \$

مصدر البيانات: Oracle ERP

الرسم البياني لمستهدفات مؤشر أداء والقيم الفعلية

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

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

التاريخ

سجل الملاحظات

owner@thesolutioncrowd.com

Oct 2021 ماذا المبيعات تراكمية؟

Friday, October 15, 2021 4:58 PM

ملاحظات

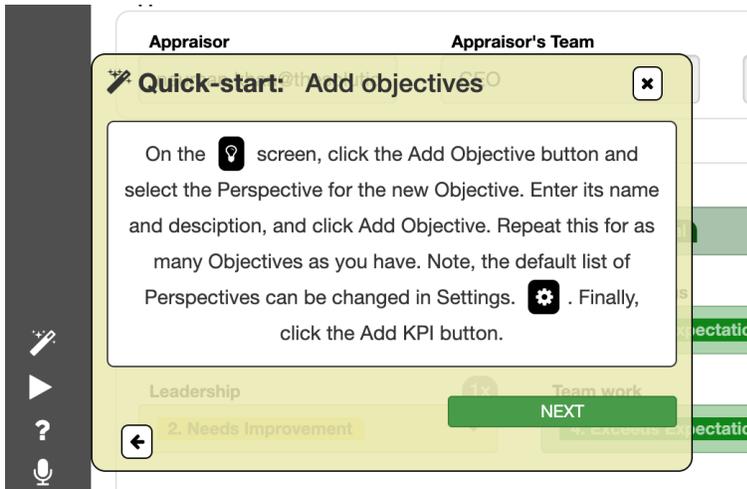
Current as of Friday, October 15, 2021 4:57 PM
Leave a message

# Help

All labels come with helpful help text on mouse hover.



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





## Kippy – Features

**Leave a message**

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

Name

Email

or sign in with:

Message

**Send**

Powered by mylivechat

**Chat now**

**Nauman**

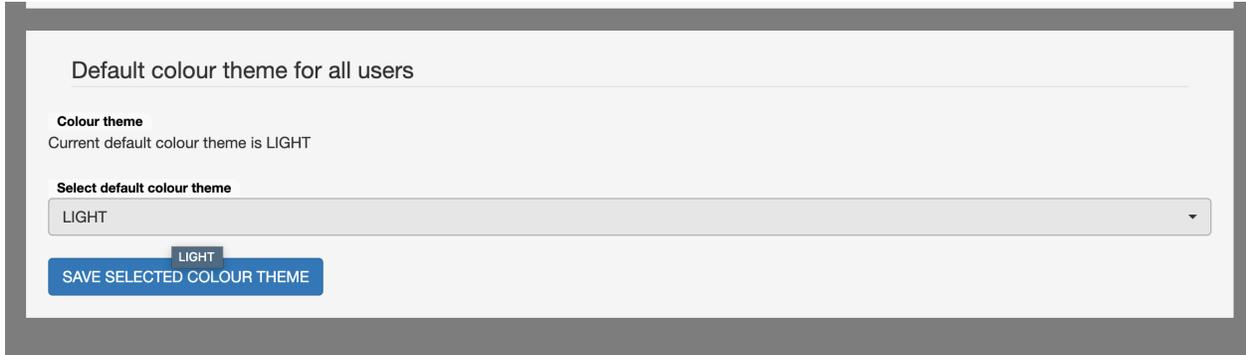
Nauman

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

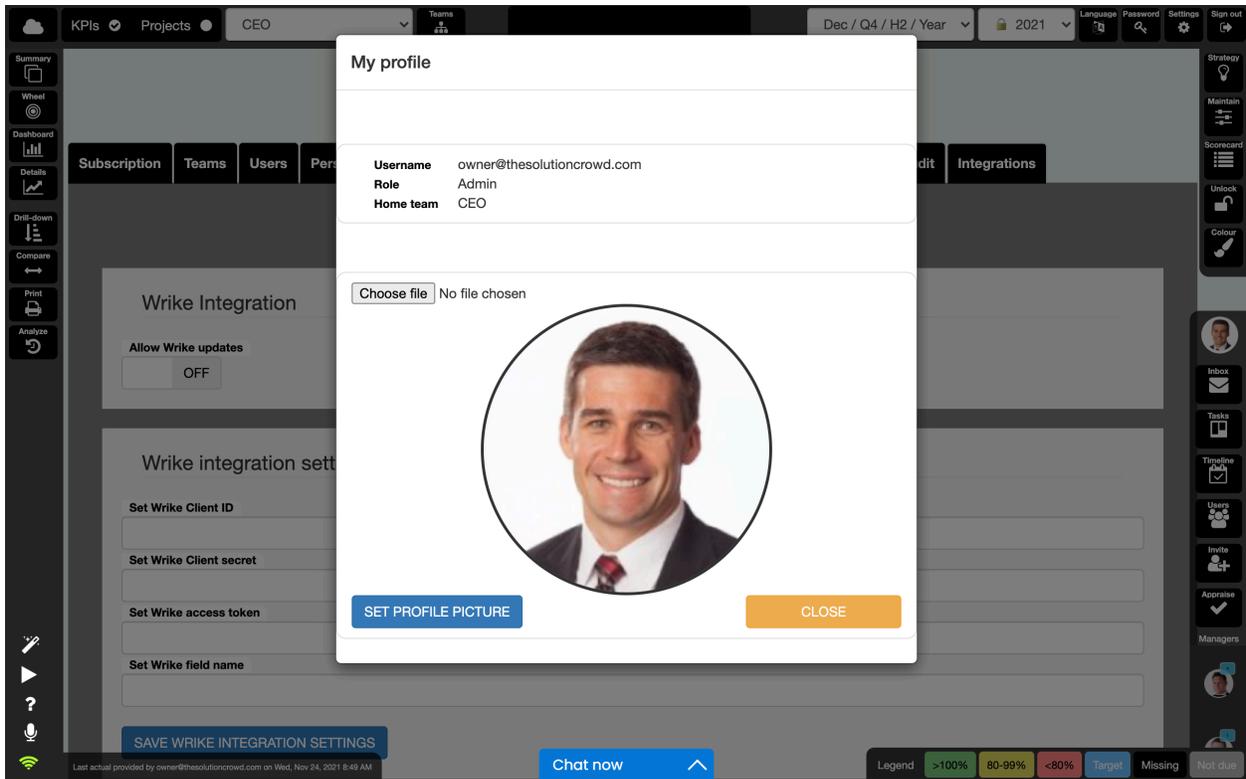
Type your message here...

# Personalisations

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



Set user profiles or let users self manage.





# Mobile responsive

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

# Navigation

## Voice control

Change screens using your microphone.

**Kippy - Voice Commands - Cheat Sheet** Click the microphone icon and clearly say one of the commands below.

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

## Keyboard shortcuts



**Shortcut to screens by pressing Shift and Function keys:**

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

## Tactile dashboards

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



## Customisations

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

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

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

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

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

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

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

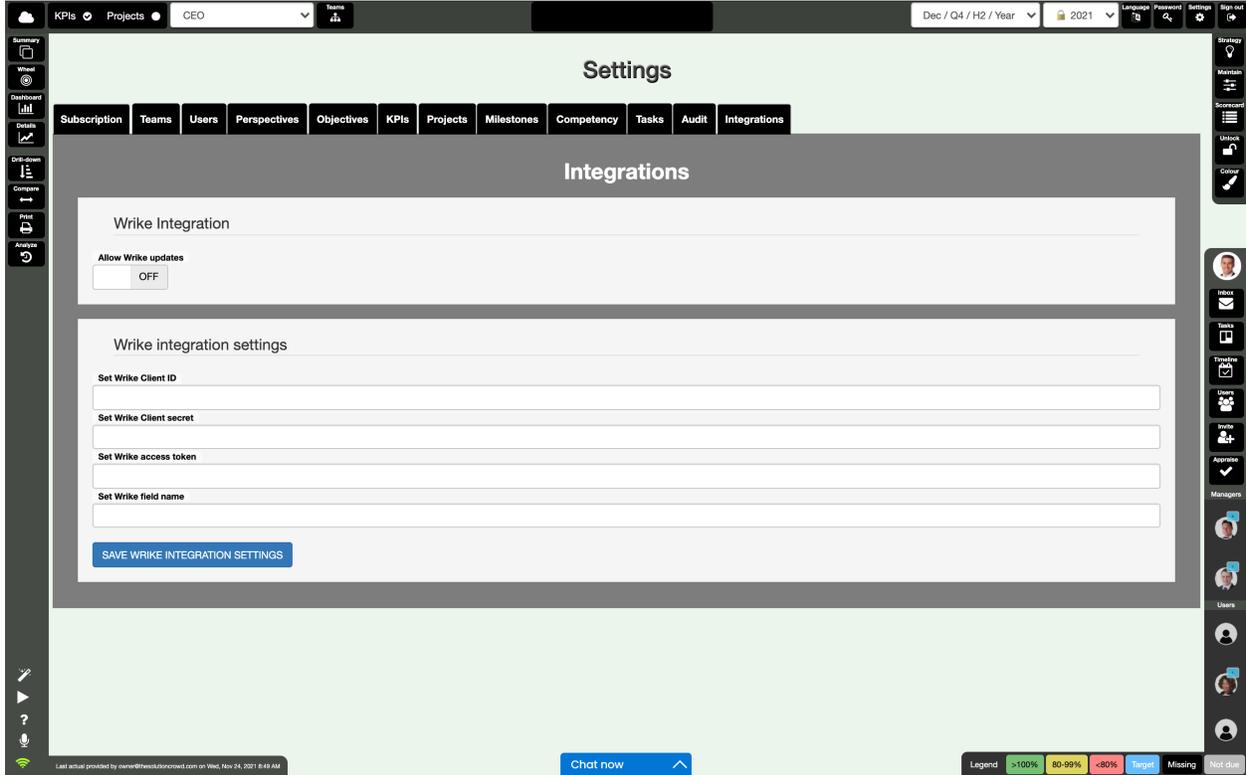
<https://www.kippy.cloud/web-api-integration-with-sharepoint>

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

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

# Built-in integrations

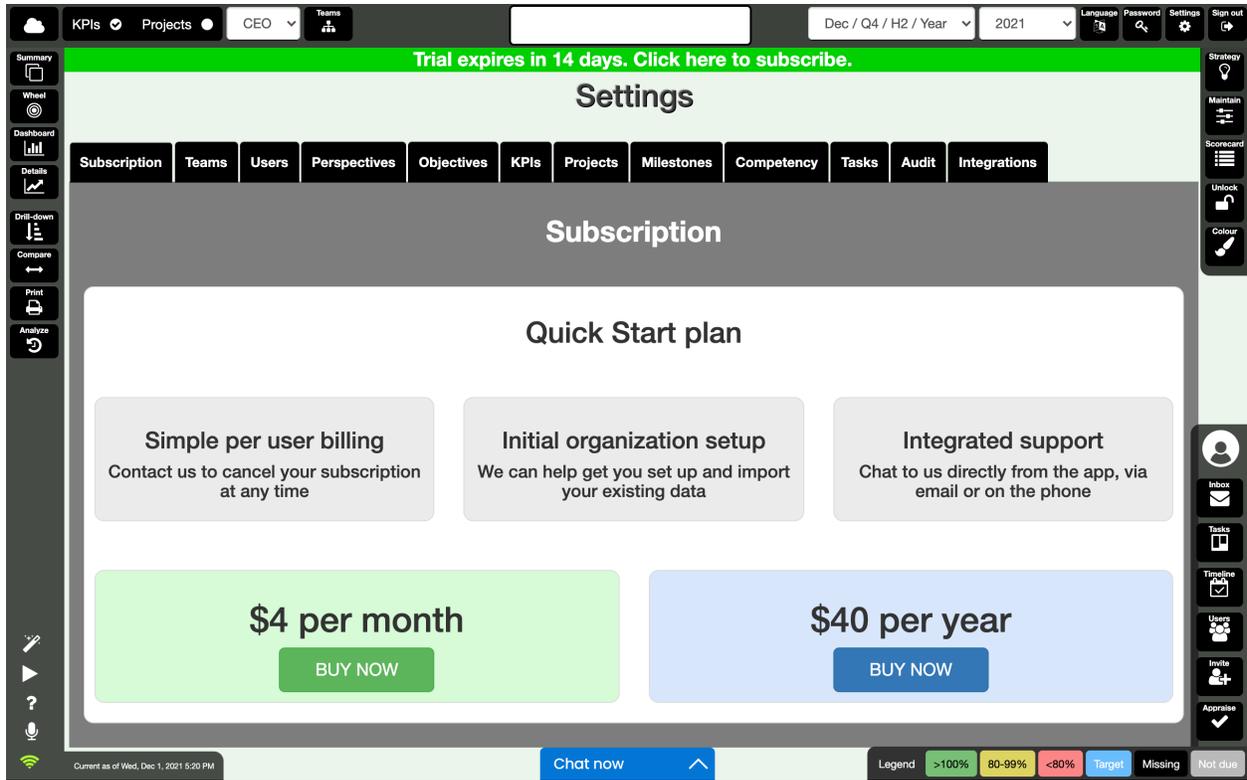
Several configurable integrations are already built-in, and can be enabled for our Enterprise customers. Please get in touch to learn more.





# 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](mailto:info@kippy.cloud) to learn more