



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 shows the Kippy dashboard interface. At the top, there's a navigation bar with 'KPIs', 'Projects', and a dropdown menu set to 'CEO'. The main header area includes 'The Solution Crowd' and date selectors for 'Jan' and '2022'. The dashboard is divided into several sections: 'Strategy' (containing Vision, Mission, and Values), 'Objectives', and a table with columns for Perspective, Objective, and Description. A video player overlay titled 'Getting started' is prominently displayed in the center, showing the text 'System owner guide'. The video player has a progress bar and a 'Need help?' button. The bottom of the dashboard features a legend with color-coded status indicators: green for '>100%', yellow for '80-99%', red for '<80%', blue for 'Target', grey for 'Missing', and light blue for 'Not due'. The right sidebar contains various user management and system settings icons.

Strategy

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

Strategy

Vision
Honoring our past by creating a future characterized by stimulated growth, development and the incessant practice of excellence in everything we do...

Mission
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 ...

Values
P – Proactive academic and personal integrity effective management operations lifelong learning among students, faculty, staff and the at large community respect for individuals in

Objectives

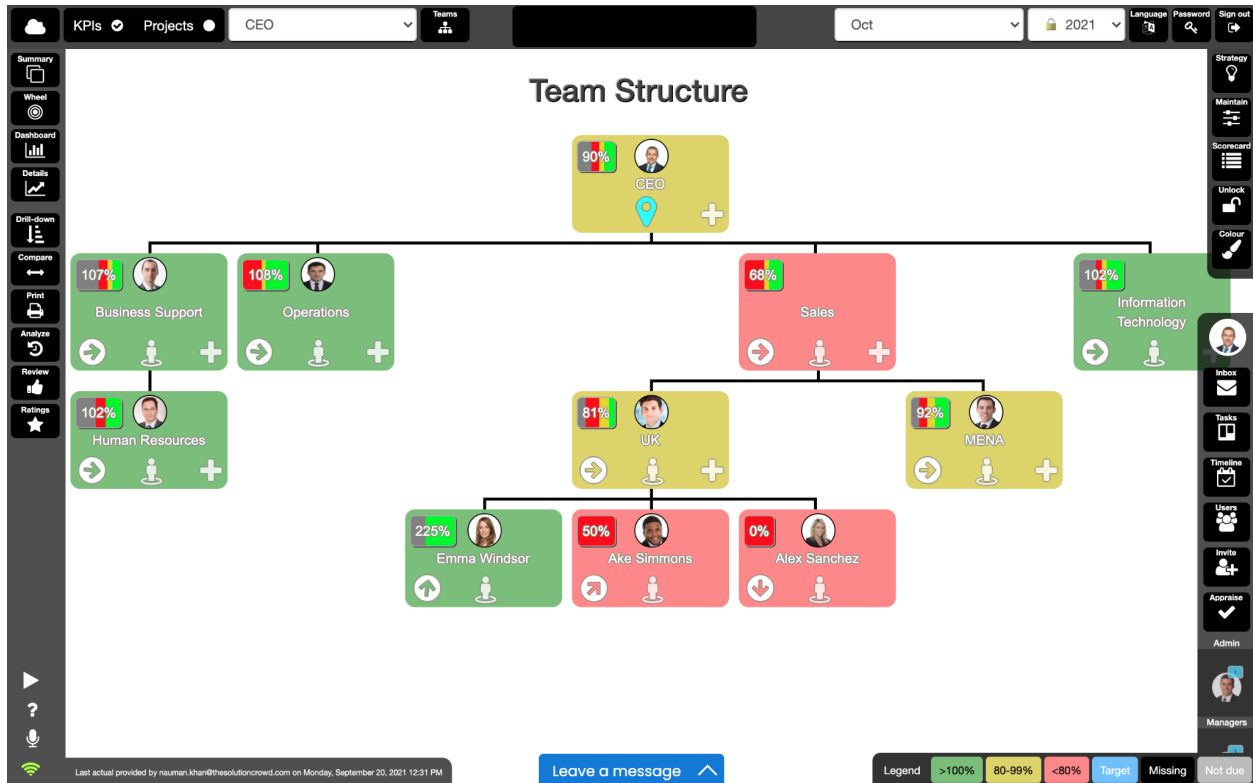
| Perspective | Objective | Description |
|-------------|--|---|
| Customers | Increase customer base & products and services | This objective is set to increase customer base & products and services |
| Customers | Provide quality & innovative customer service | This objective is set to provide quality & 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 |

Current as of Friday, October 15, 2021 3:34 PM

Leave a message

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

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 screenshot displays the Kippy dashboard interface with two modal windows open over a hierarchical team structure. The background dashboard shows a tree view of teams and their performance metrics. The top modal, titled 'Add a new team', is for adding a team to the 'Sales' department. The bottom modal, titled 'Add a new team member', is for adding a new member to the 'UK' team.

Top Modal: Add a new team

- Add to Sales**
- Team name**: South America
- Buttons**: CLOSE, ADD TEAM

Bottom Modal: Add a new team member

- Add to UK**
- User's name**: Bob Jones
- User's email**: bob.jones@thesolutioncrowd.com
- Buttons**: CLOSE, ADD USER

Background Dashboard Data:

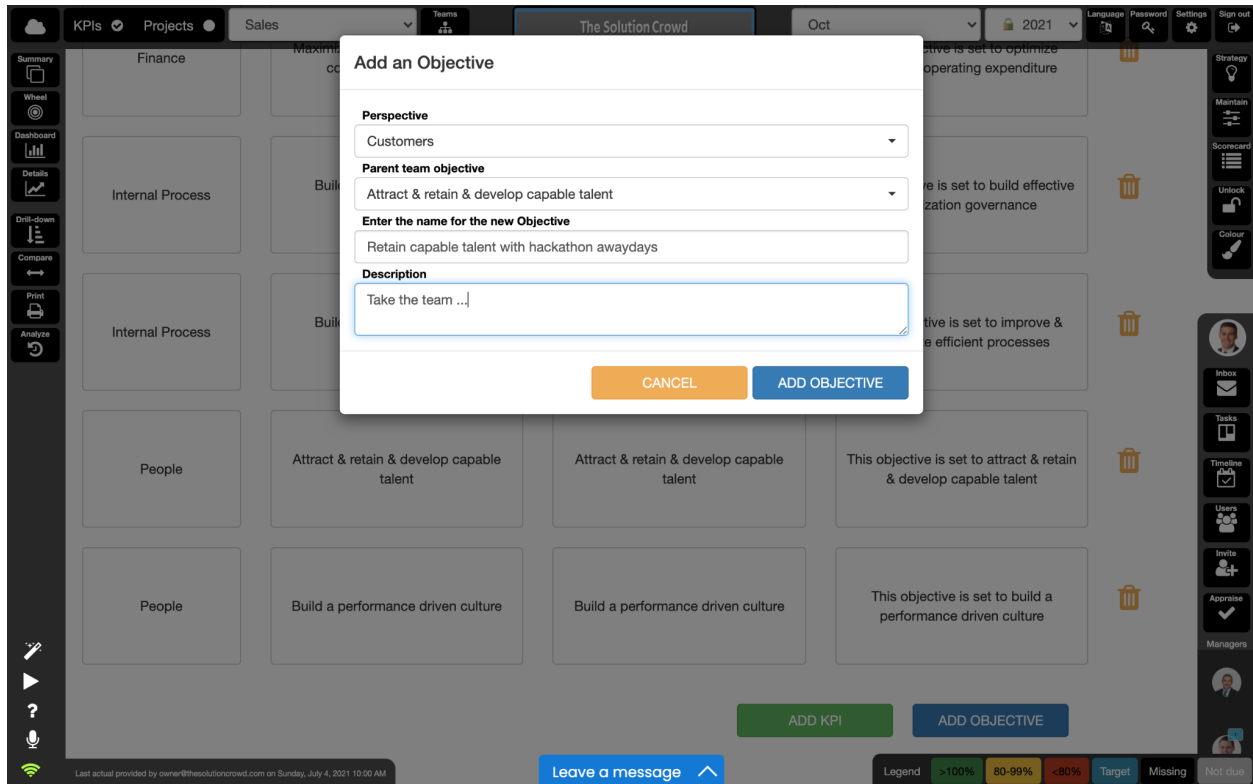
- Teams and Performance:**
 - Business Support: 107%
 - Operations: 108%
 - Human Resources: 102%
 - Sales: 81% (UK), 92% (MENA)
 - Information Technology: 102%
- Team Members and Performance:**
 - Emma Windsor: 225%
 - Ake Simmons: 50%
 - Alex Sanchez: 0%

Dashboard Elements:

- Top Bar:** KPIs, Projects, CEO, Teams, Oct, 2021, Language, Password, Settings, Sign out
- Left Sidebar:** Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, Analyze
- Right Sidebar:** Strategy, Maintain, Scorecard, Unlock, Colour, Inbox, Tasks, Timeline, Users, Invite, Appraise, Managers
- Bottom Bar:** Leave a message, Legend (>100%, 80-99%, <80%, Target, Missing, Not due)

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.



The screenshot displays the Kippy dashboard interface. A modal window titled "Add an Objective" is centered on the screen. The modal contains the following fields and options:

- Perspective:** A dropdown menu with "Customers" selected.
- Parent team objective:** A dropdown menu with "Attract & retain & develop capable talent" selected.
- Enter the name for the new Objective:** A text input field containing "Retain capable talent with hackathon awaydays".
- Description:** A text input field containing "Take the team ...".

At the bottom of the modal are two buttons: "CANCEL" (orange) and "ADD OBJECTIVE" (blue). The background dashboard shows a grid of existing objectives and KPIs, such as "Internal Process", "People", and "Build a performance driven culture". The top navigation bar includes tabs for "KPIs", "Projects", "Sales", and "Teams". The right sidebar contains various user management and system settings icons.

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.

Summary

Wheel

Dashboard

Details

Drill-down

Compare

Print

Analyze

KPIs

Projects

Emma Windsor

Teams

Oct

2021

Language

Password

Settings

Sign out

Strategy

Maintain

Scorecard

Unlock

Colour

Inbox

Tasks

Timeline

Users

Invite

Appraise

Managers

Perspective | Objective | KPI

Customers | Provide quality & innovative customer service | Positive customer feedback

Objective

Provide quality & innovative customer service

KPI Name

Positive customer feedback

Owner

emma.windsor@thesolutioncrowd.c

Direction

Increase is better

Weight

1x

Unit

Frequency

Monthly

Cumulative

Yes

Description

Formula

Data Source

Targets and actuals for 2021

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

KPI approval status

☐ Approved

CREATE NEW KPI

EDIT KPI

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

Leave a message

Legend

>100%

80-99%

<80%

Target

Missing

Not due

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 revenues as per financial statement | owner@thesolutioncrowd.com | 3x | Mill \$ | Yes | Operations | Increase is better | Monthly | 50 | 6 | 60 |

OKRs

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



Full OKR mode

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

KPIs

Projects

Emma Windsor

Oct

2021

Language

Password

Settings

Sign out

Summary

Wheel

Dashboard

Details

Drill-down

Compare

Print

Analyze

Strategy

Maintain

Scorecard

Unlock

Colour

Inbox

Tasks

Timeline

Users

Invite

Appraise

Managers

Maintain

Objective

Improve & automate efficient processes

Description

Formula

KPI Name

Number of passed builds

Owner

emma.windsor@thesolutioncrowd.c

Direction

Increase is better

Weight

1x

Unit

Frequency

Quarterly

Cumulative

Yes

Data Source

Targets and actuals for 2021

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

KPI approval status

☐ Approved

CANCEL

SAVE NEW KPI

Leave a message

Legend

>100%

80-99%

<80%

Target

Missing

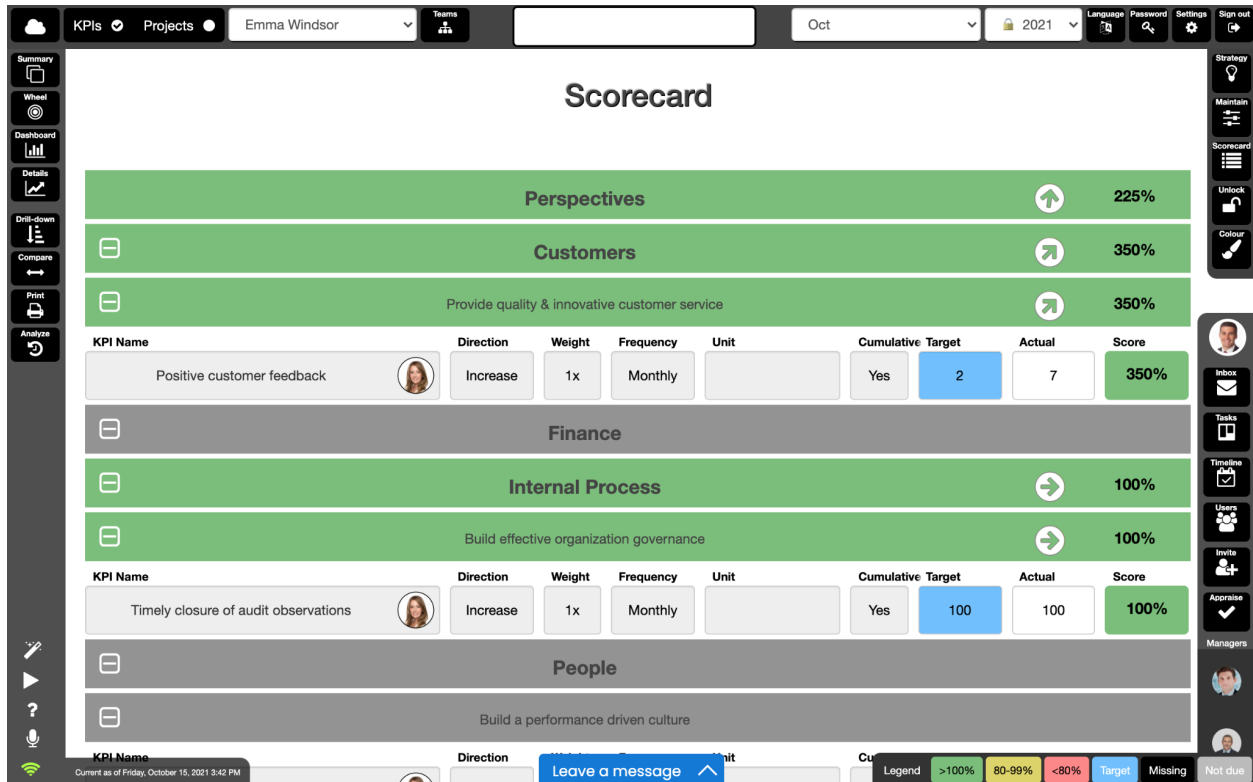
Not due

Updating Actuals

KPI Owner UI

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

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



The screenshot displays the Kippy Scorecard interface for a user named Emma Windsor. The interface is organized into sections for different perspectives: Customers, Finance, Internal Process, and People. Each section contains a list of KPIs with their respective targets and actual values.

| Perspective | KPI Name | Direction | Weight | Frequency | Unit | Cumulative | Target | Actual | Score |
|------------------|---|-----------|--------|-----------|------|------------|--------|--------|-------|
| Customers | Provide quality & innovative customer service | | | | | | | | 350% |
| | Positive customer feedback | Increase | 1x | Monthly | | Yes | 2 | 7 | 350% |
| Internal Process | Build effective organization governance | | | | | | | | 100% |
| | Timely closure of audit observations | Increase | 1x | Monthly | | Yes | 100 | 100 | 100% |

The interface also includes a sidebar with navigation options like Summary, Wheel, Dashboard, Details, Drill-down, Compare, Print, and Analyze. A legend at the bottom indicates score ranges: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).



Check-in microapp

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

Check in

Please sign in

emma.windsor@thesolutioncrowd.com

.....

Sign in

© 2021



My KPIs

Positive customer feedback
(350%)

7 / 2

Emma Windsor
Customers
Provide quality & innovative customer service

Update

Timely closure of audit observations
(100%)

100 / 100

Emma Windsor
Internal Process
Build effective organization governance

Update

of innovation ideas submitted

? / 3

Emma Windsor
People
Build a performance driven culture

Update

Summary

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

KPI details

Positive customer feedback (350%)

7 / 2

Emma Windsor
Customers
Provide quality & innovative customer service

Increase is better | 1x | Monthly | Cumulative

Submit new actual

Actual


Save

Cancel



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

The KPI below has a Unit of Completed.

Sign out

KPI details

Jun 2022

Hold town hall event (100%)

Completed **Yes**

STM

Process

Strengthen Cross Functional Working

Increase is better | 1x | Monthly | Cumulative

last updated 25 second ago

Submit new actual

☐ Not Completed

☒ Completed

Save

Cancel

The KPI below has a Unit of OKR.



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



Summary

Wheel

Dashboard

Details

Drill-down

Compare

Print

Analyze

Cloud

KPIs

Projects

Emma Windsor

Teams

Oct

2021

Language

Password

Settings

Sign out

Strategy

Maintain

Scorecard

Unlock

Colour

Inbox

Tasks

Timeline

Users

Invite

Appraise

Managers

Leave a message

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

Maintain

Perspective | Objective | KPI

Customers | Provide quality & innovative customer service | Positive customer feedback

Objective Provide quality & innovative customer service

KPI Name Positive customer feedback

Owner emma.windsor@thesolutioncrowd.c

Direction Increase is better

Weight 1x

Unit

Frequency Monthly

Cumulative Yes

Description

Formula

Data Source

Targets and actuals for 2021

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

KPI approval status

☒ Approved

CANCEL SAVE KPI

Built-in adapters

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

Formula

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

Data Source

TFS

Web APIs

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

<https://kippy-tsc.appspot.com/api/v3/actual/?>

organisation=<org>&username=<username>&password=<password>&year=<year>&period=<p
eriod>&board=<boardName>&name=<name>&value=<value>

and pulled out again

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

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

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

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

← → ↻ ⓘ view-source:https://kippy-tsc.appspot.com/api/v2/projects/?username=

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

Formulas

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

Formula

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

The in-built formulas include divide, multiply, add, subtract, percentage 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).

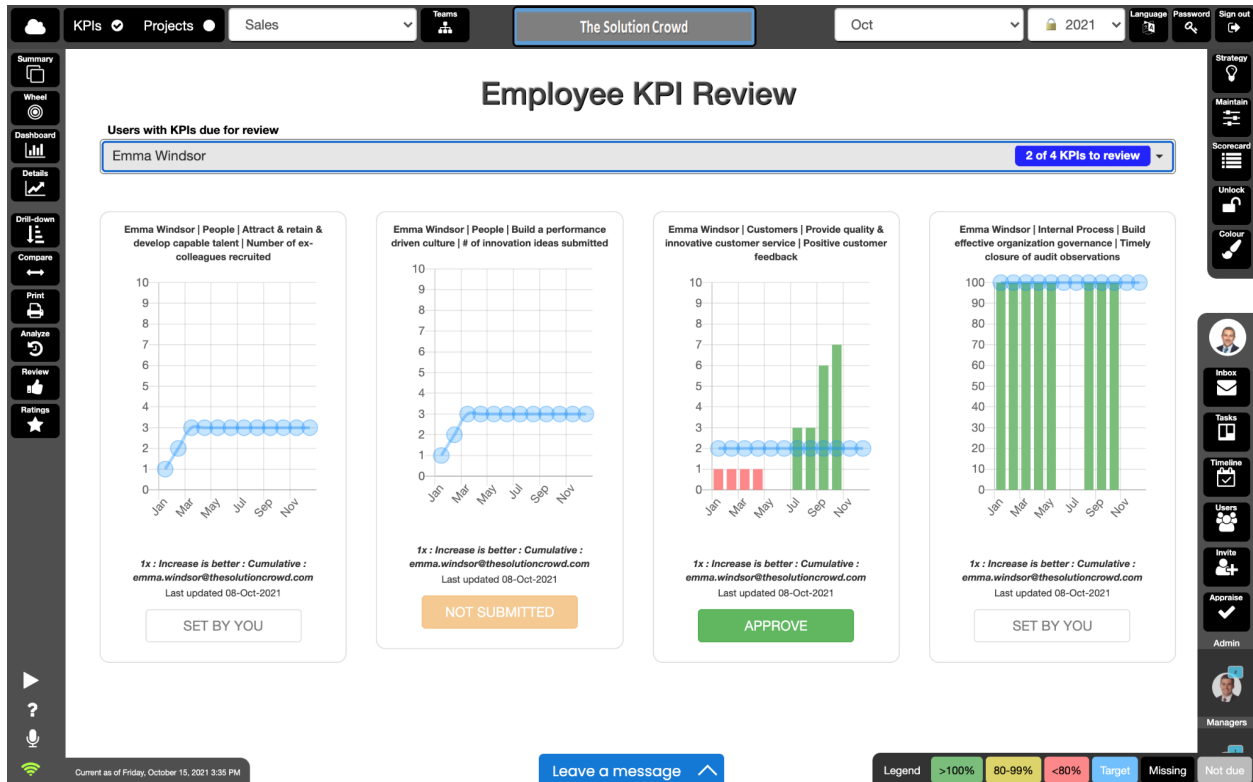
Formula

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

Reviewing actuals

Manager UI


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





Manager approval microapp

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



Manager

Please sign in

Sign in

© 2021

KippySign out

Individual KPIs

2021 > Oct

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

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



Employee KPI Review

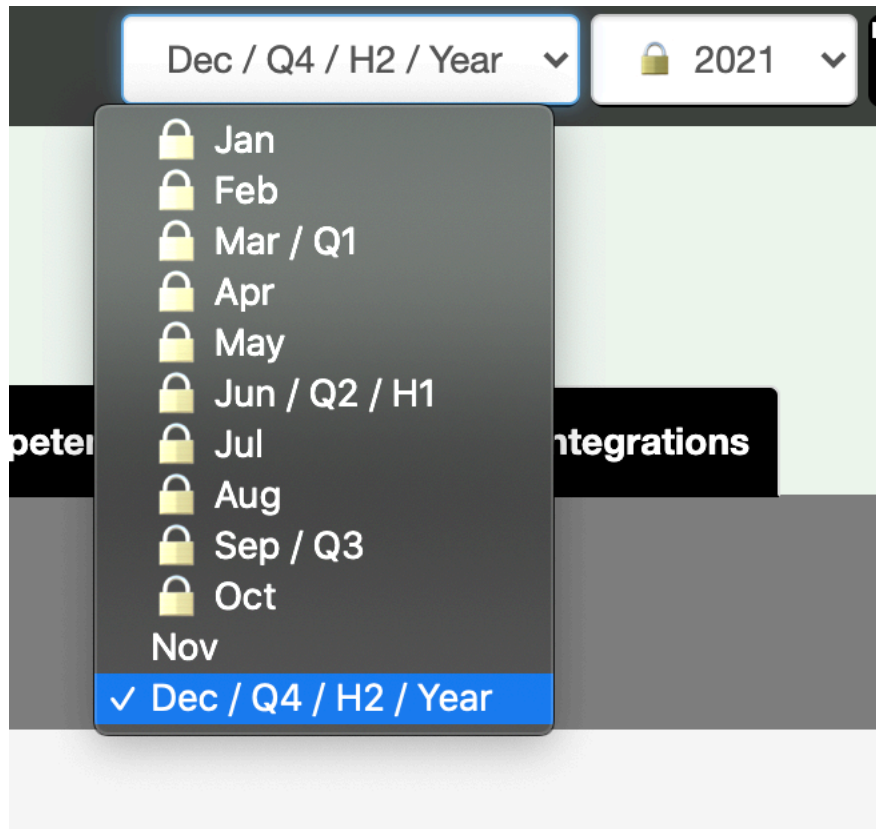
[2021](#) > [Oct](#) > Emma Windsor

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

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

History

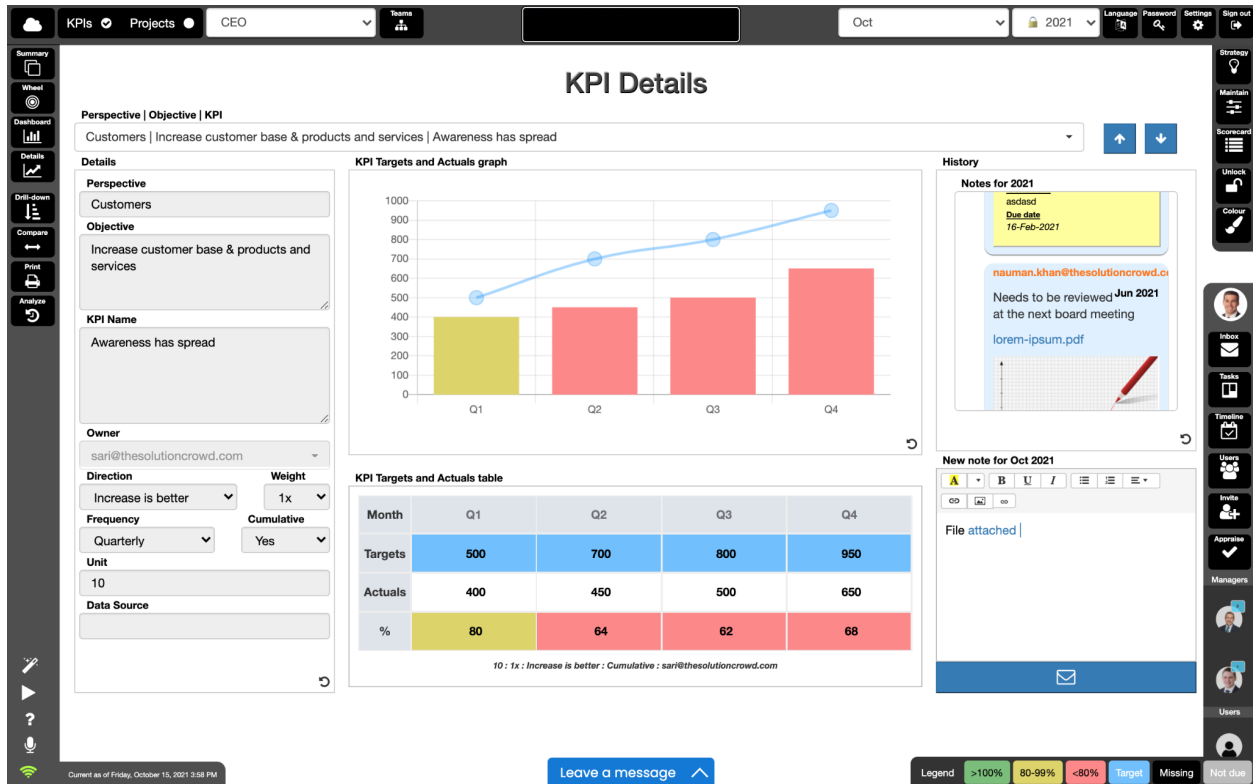
Review historical organisation performance by going back to previous months and years.





Chat and wiki

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





Kippy – Features

The screenshot displays the Kippy dashboard interface. A modal window titled "Insert File" is open, allowing users to upload a file or enter a URL. The background shows a dashboard for a KPI titled "Customers | Increase customer base & products and services".

Insert File Modal:

- Select from files: No file chosen
- File URL:
-

KPI 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 done (grey)



History

Audit Log

| |
|---|
|  nauman.khan@thesolutioncrowd.com Task deleted for 2021 period 2 on team CEO for Awareness has spread Saturday, September 25, 2021 4:33 PM |
|  nauman.khan@thesolutioncrowd.com Task added for 2021 period 9 on team CEO for Awareness has spread Saturday, September 25, 2021 4:33 PM |
|  nauman.khan@thesolutioncrowd.com Task deleted for 2021 period 2 on team CEO for Awareness has spread Thursday, August 12, 2021 8:22 AM |
|  |

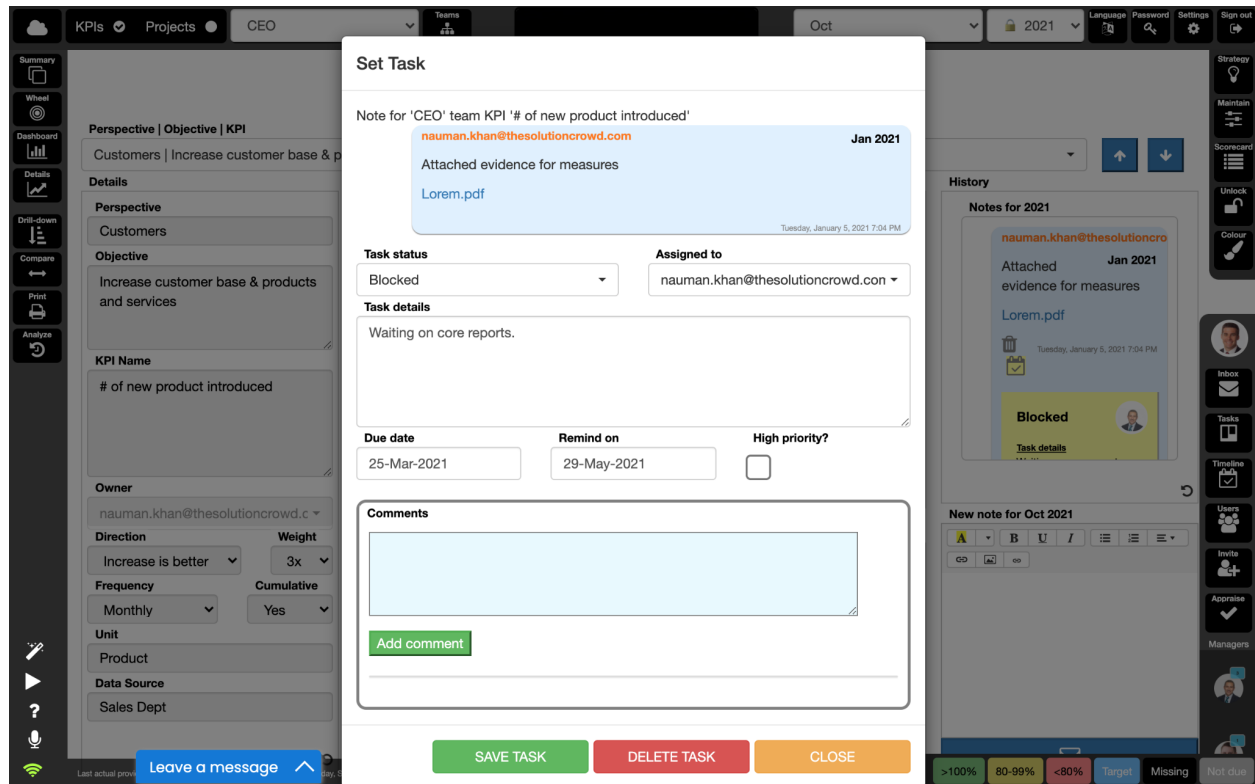
Mentions

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

Tasks

Task setting

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



Set Task

Note for 'CEO' team KPI '# of new product introduced'

[nauman.khan@thesolutioncrowd.com](#) Jan 2021

Attached evidence for measures

[Lorem.pdf](#)

Tuesday, January 5, 2021 7:04 PM

Task status

Blocked

Assigned to

[nauman.khan@thesolutioncrowd.com](#)

Task details

Waiting on core reports.

Due date

25-Mar-2021

Remind on

29-May-2021

High priority?

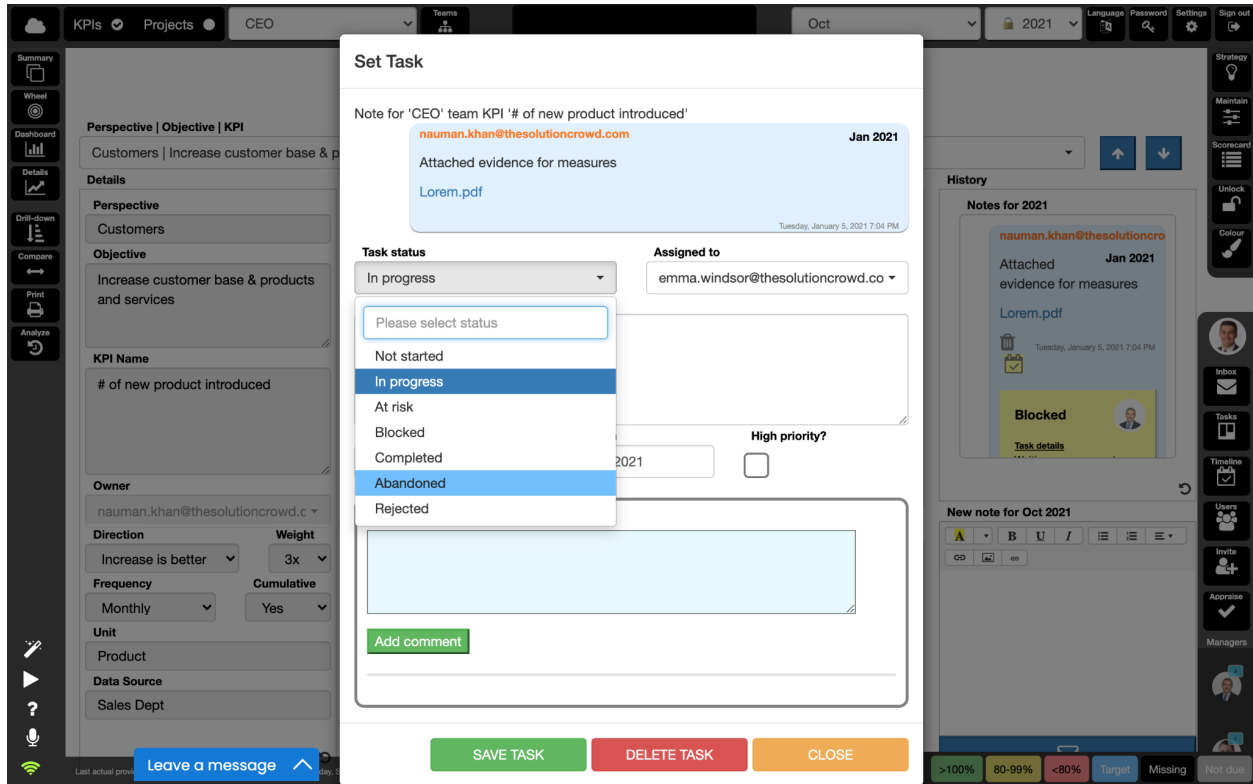
☐

Comments

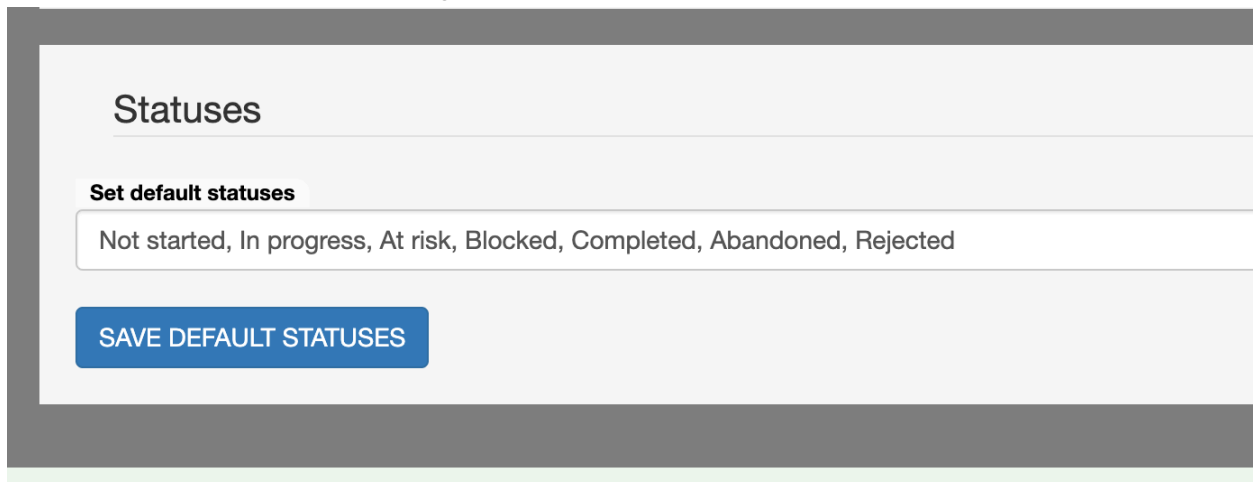
[Add comment](#)

[SAVE TASK](#) [DELETE TASK](#) [CLOSE](#)

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

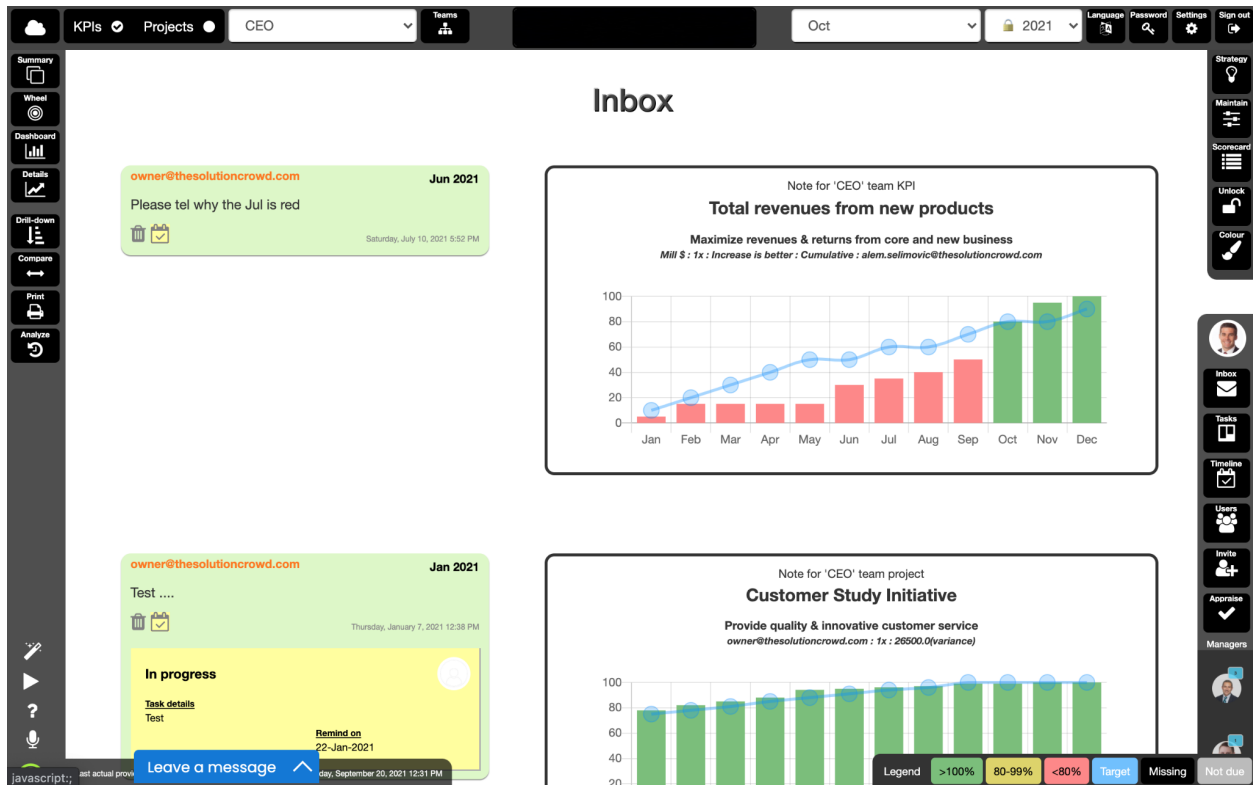


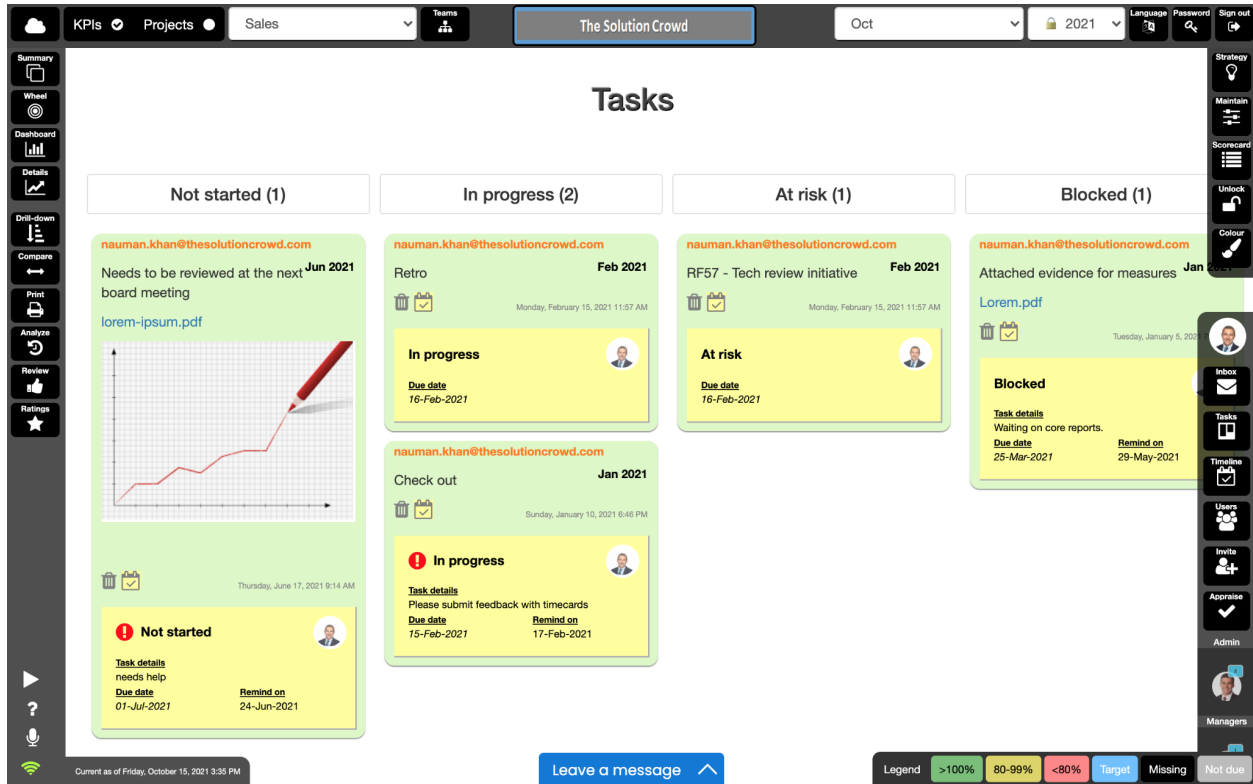
The set of task statuses are configurable.



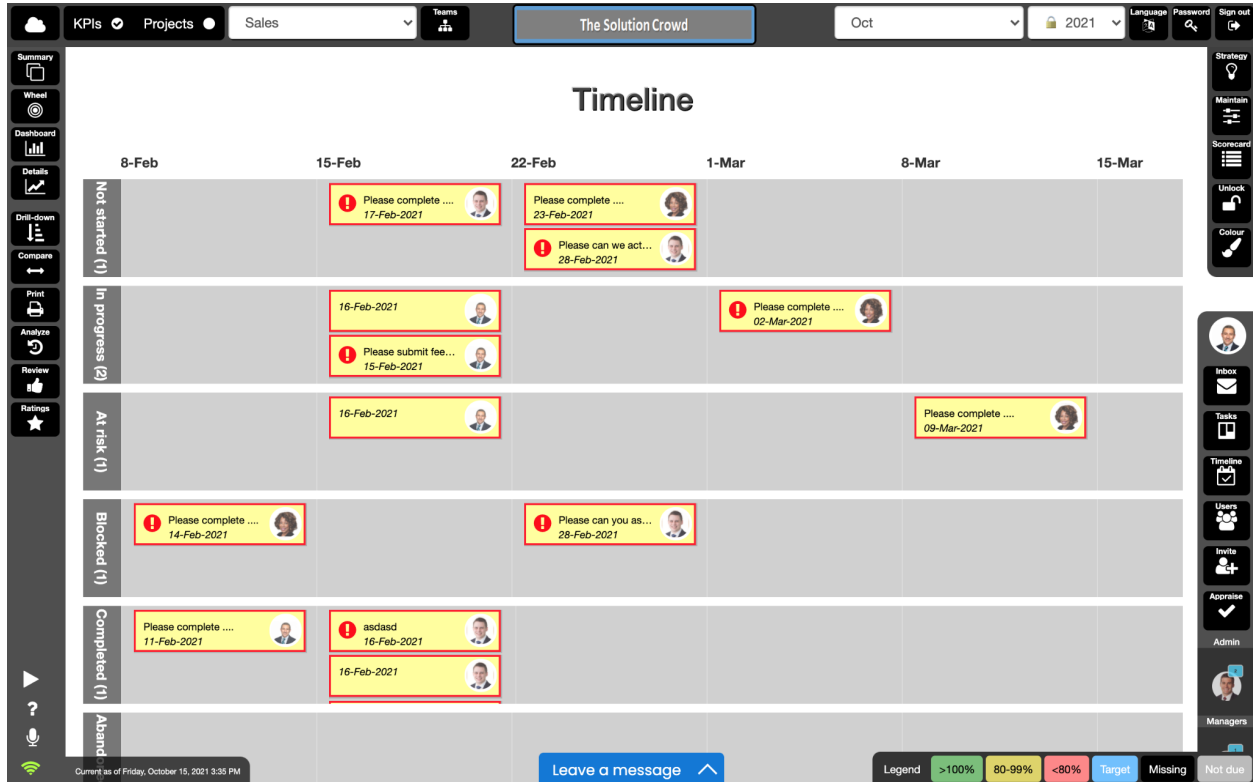
Task viewing

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



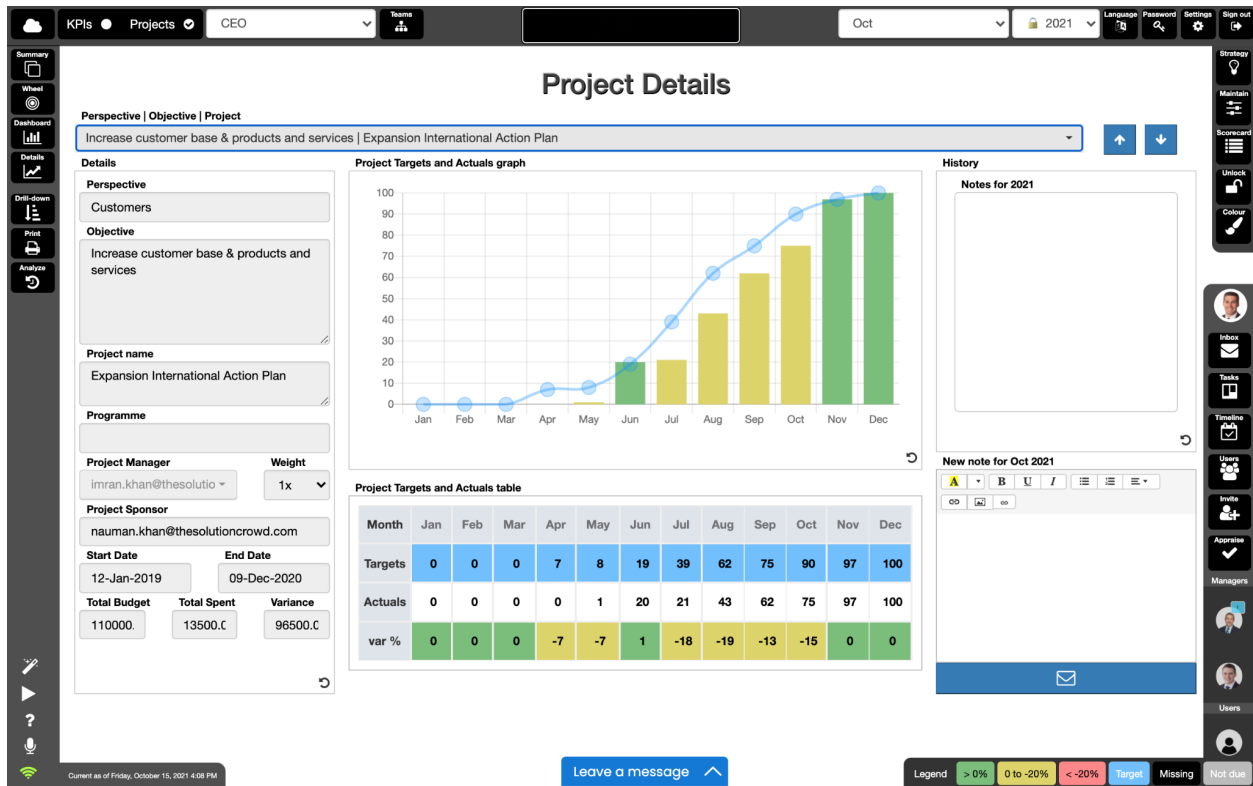


Tasks can be drag and dropped to different statuses in the Tasks screen.



Projects

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





KPIs

Projects

CEO

Teams

Oct

2021

Language

Password

Settings

Sign out

Summary

Wheel

Dashboard

Details

Drill-down

Print

Analyze

Strategy

Light

Maintain

Scorecard

Unlock

Colour

Inbox

Tasks

Timeline

Users

Invite

Appraise

Managers

Users

Perspective | Objective | Project

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

Details

Perspective

Customers

Objective

Increase customer base & products and services

Project name

Expansion International Action Plan

Programme

Project Manager

imran.khan@thesolutio

Weight

1x

Project Sponsor

nauman.khan@thesolutioncrowd.com

Start Date

12-Jan-2019

End Date

09-Dec-2020

Total Budget

110000.

Total Spent

13500.0

Variance

96500.0

Project Targets and Actuals graph

Expansion International Action Plan

Participate international Exhibitions

Regular & Potential international customers visits

Explore stockist in europe and africa

Add more products

Project Targets and Actuals table

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

History

Notes for 2021

New note for Oct 2021

Leave a message

Legend > 0% 0 to -20% < -20% Target Missing Not due

KPIs

Projects

CEO

Teams

Oct

2021

Language

Password

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Colour

Inbox

Tasks

Timeline

Users

Invite

Appraise

Managers

Users

Perspective | Objective | Project

Expansion International Action Plan

Objective

Increase customer base & products and services

Project name

Expansion International Action Plan

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.

Total spent

13500.0

Variance

96500.0

Programme

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 owner

alem.selimovic@thesolutionc

Milestone weight

1x

Milestone start date

06-Jun-2019

Milestone end date

13-Aug-2020

Milestone description

Add more products

Targets and actuals for 2021

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

Milestone name

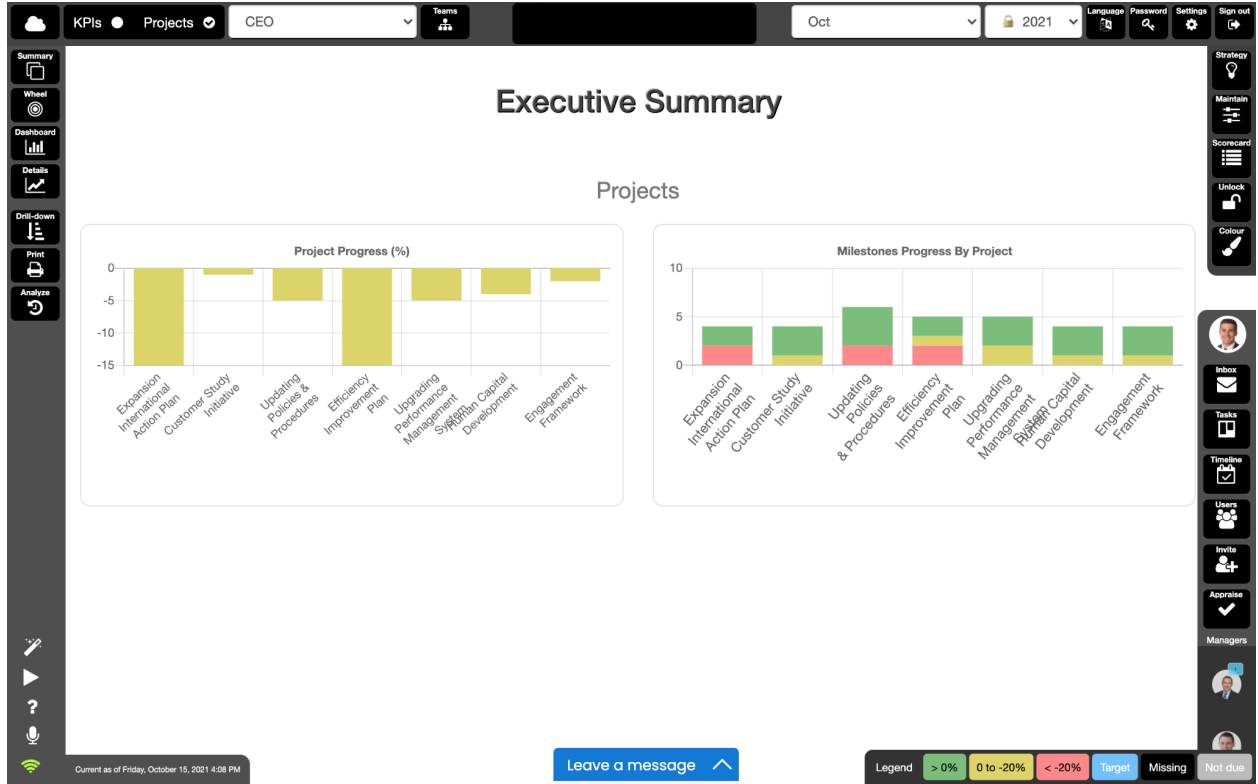
Explore stockist in europe and africa

Milestone description

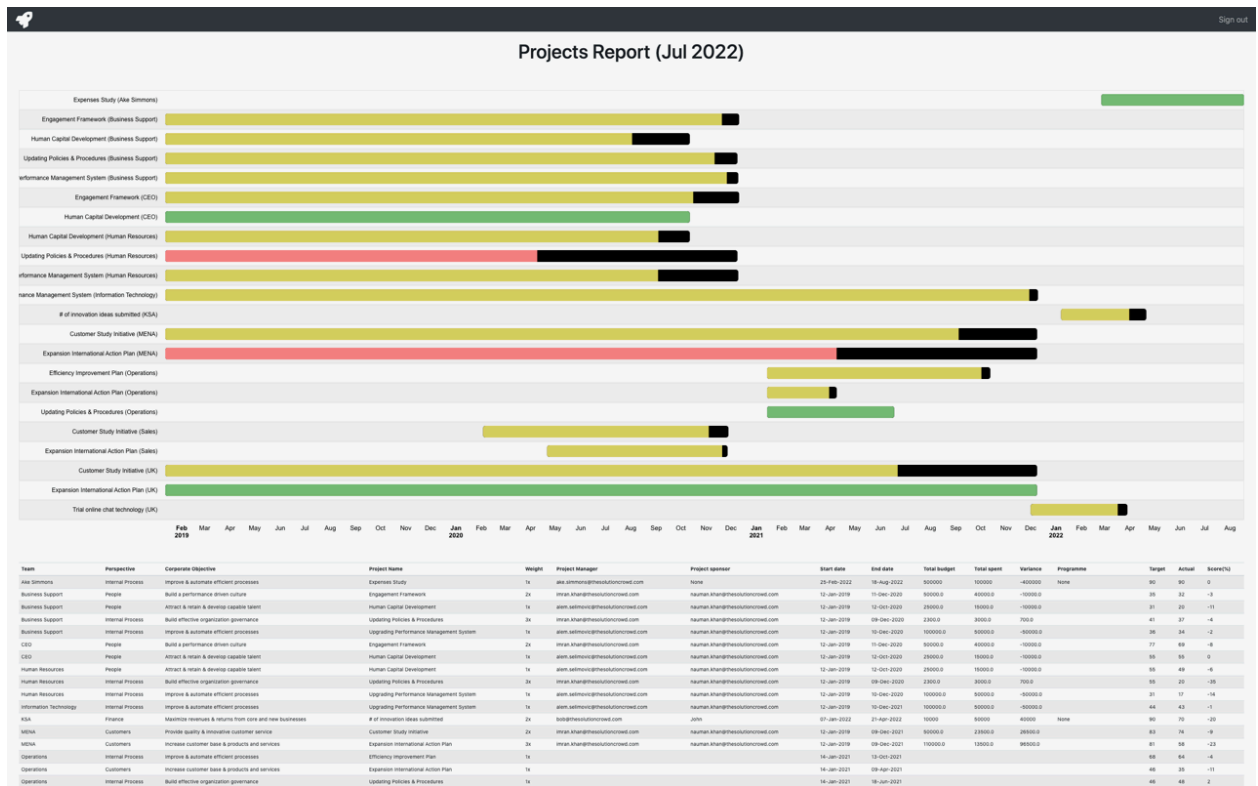
Explore stockist in europe and africa

Leave a message

Legend > 0% 0 to -20% < -20% Target Missing Not due



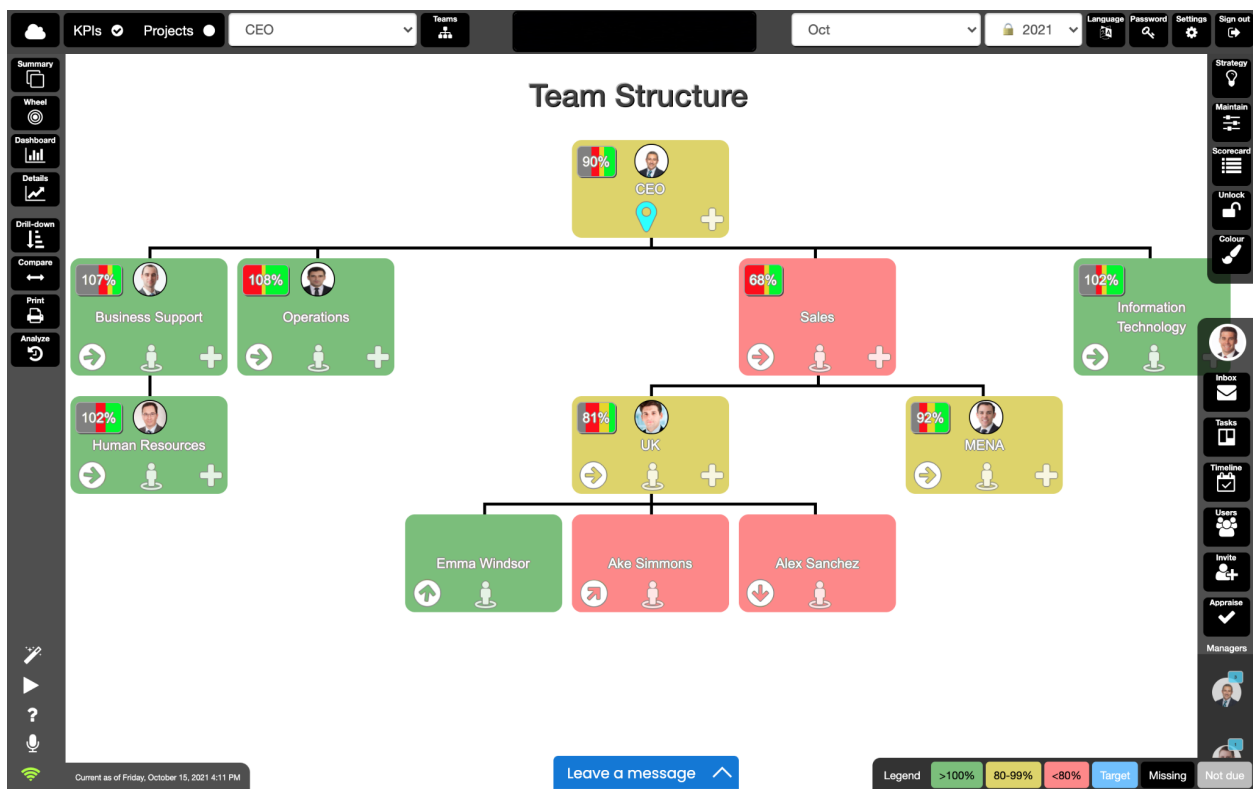
The Projects microapp summarizes all projects and project performance on a Gantt chart.

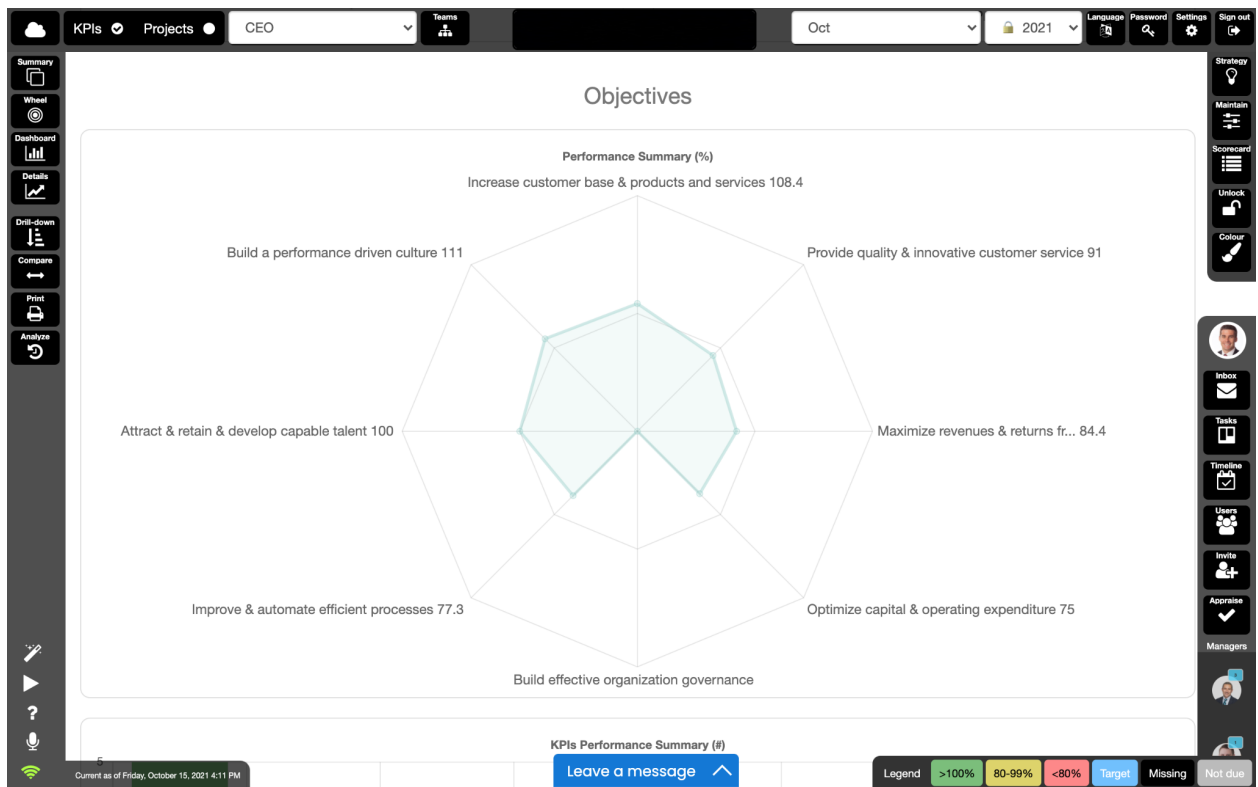
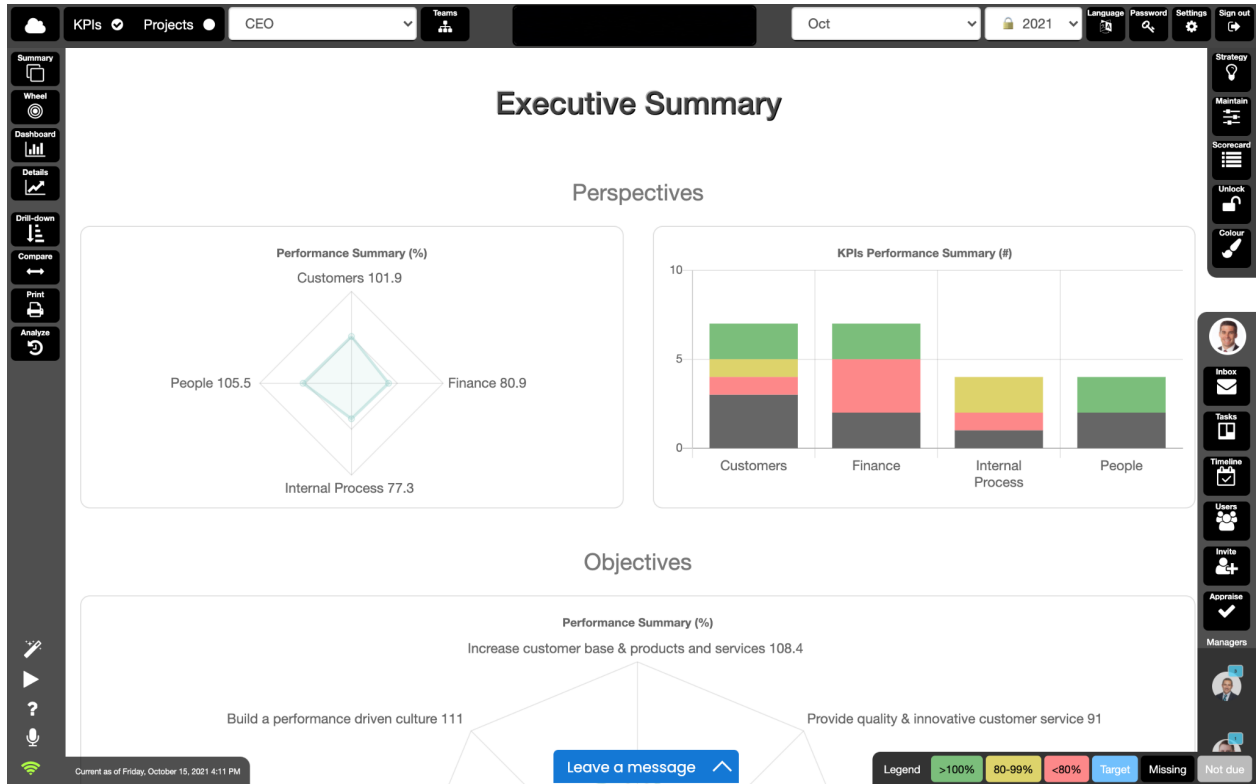


Live dashboards

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

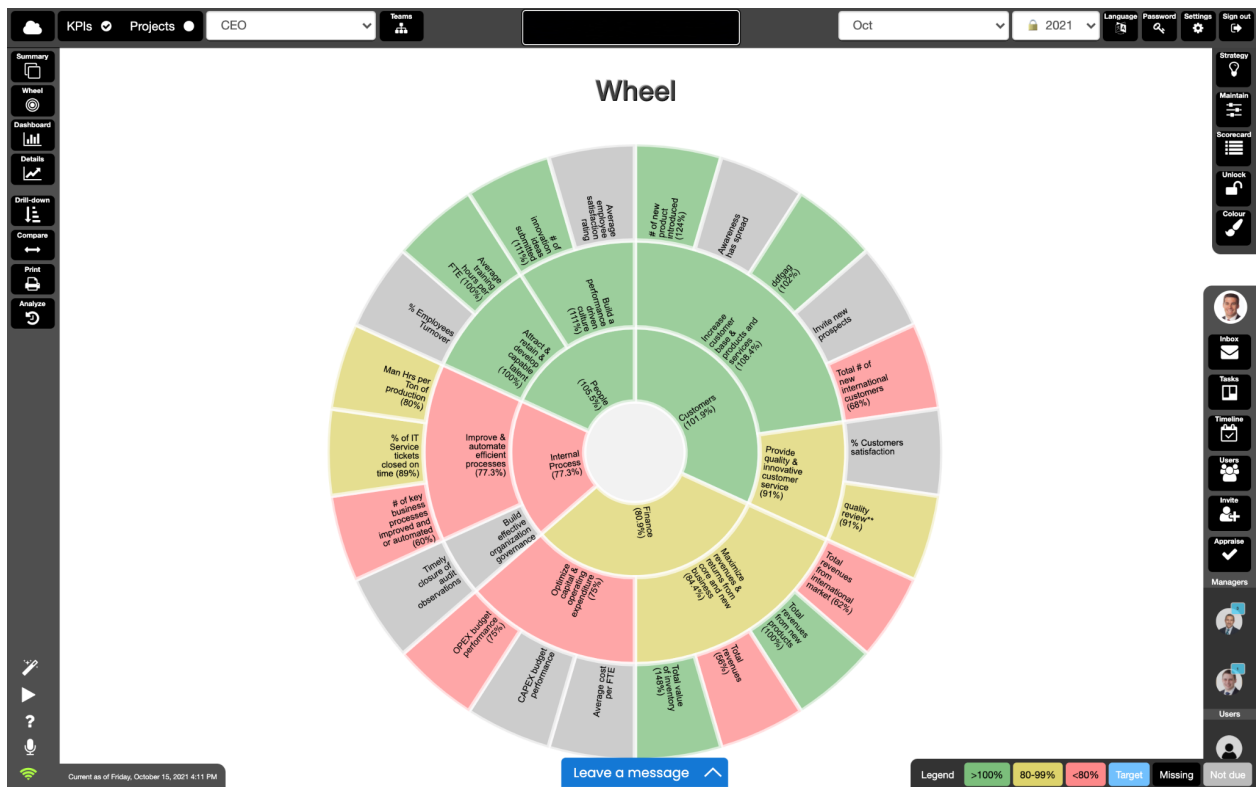
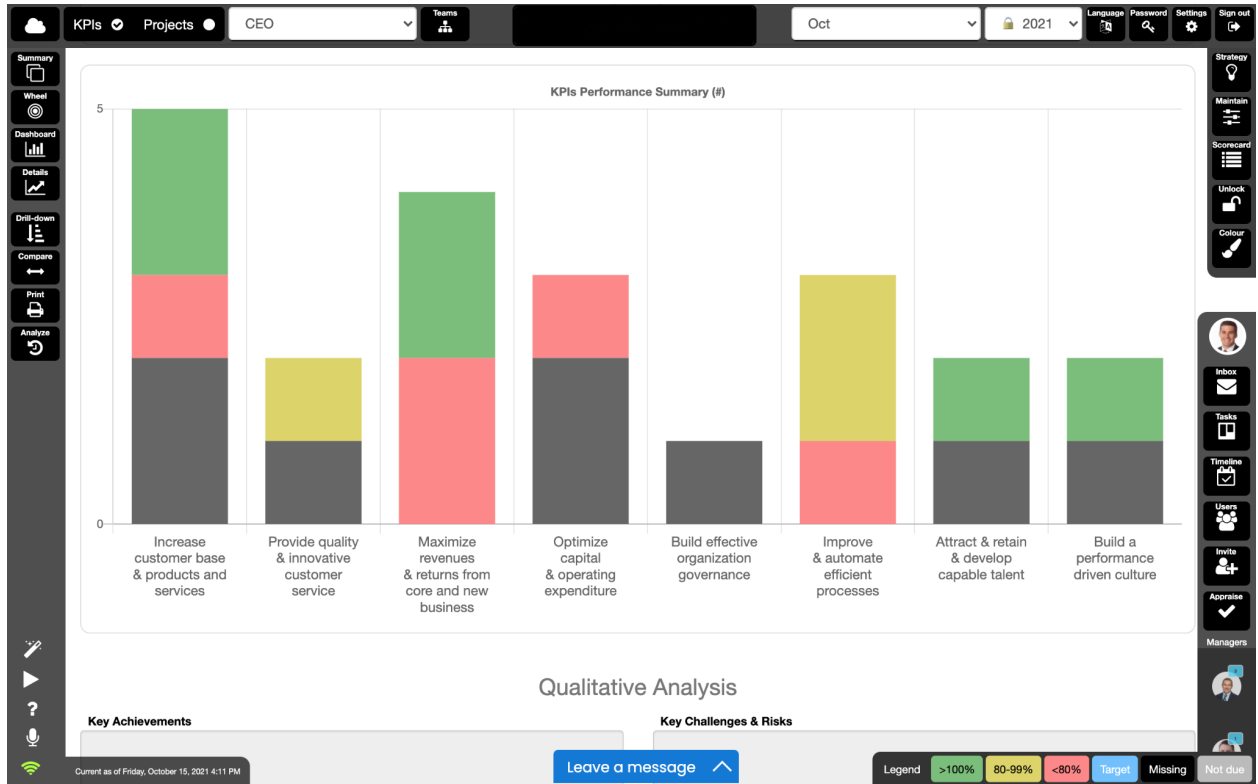
- By corporate performance
- By team
- By shared objective
- By project
- By employee
- And much, much more.

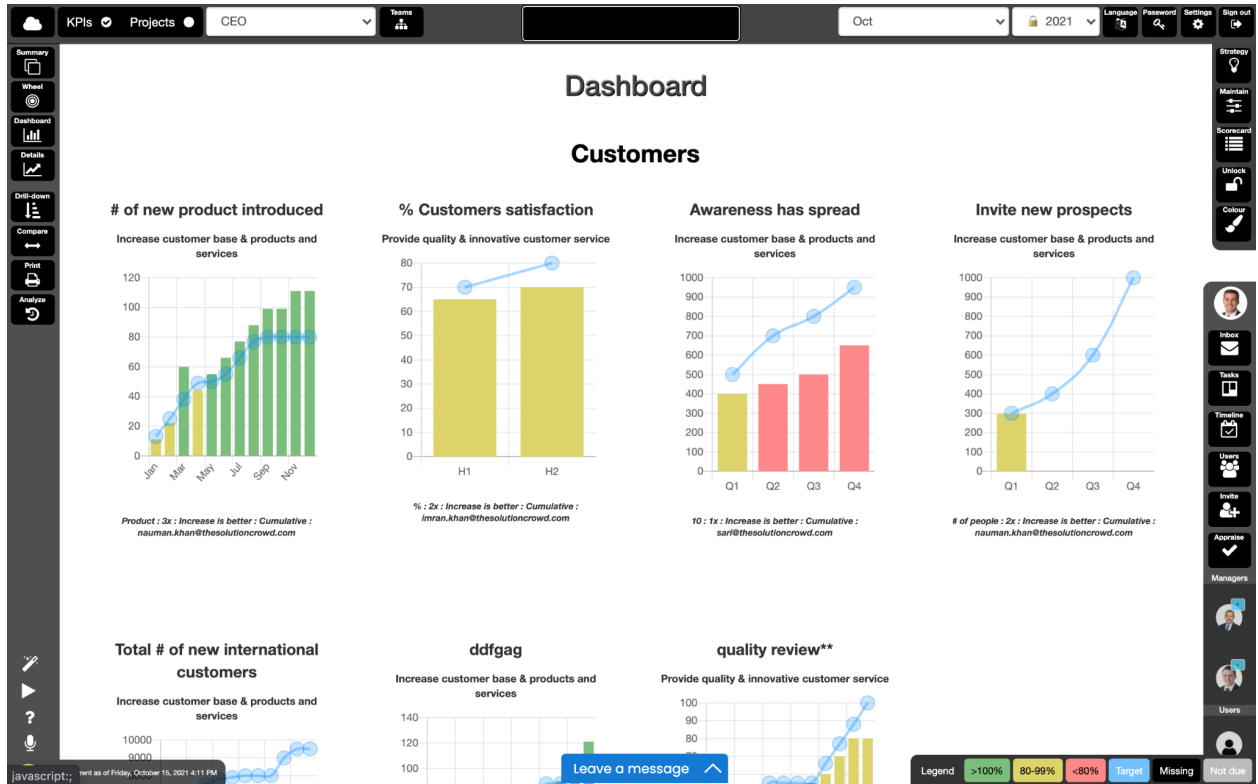






Kippy – Features



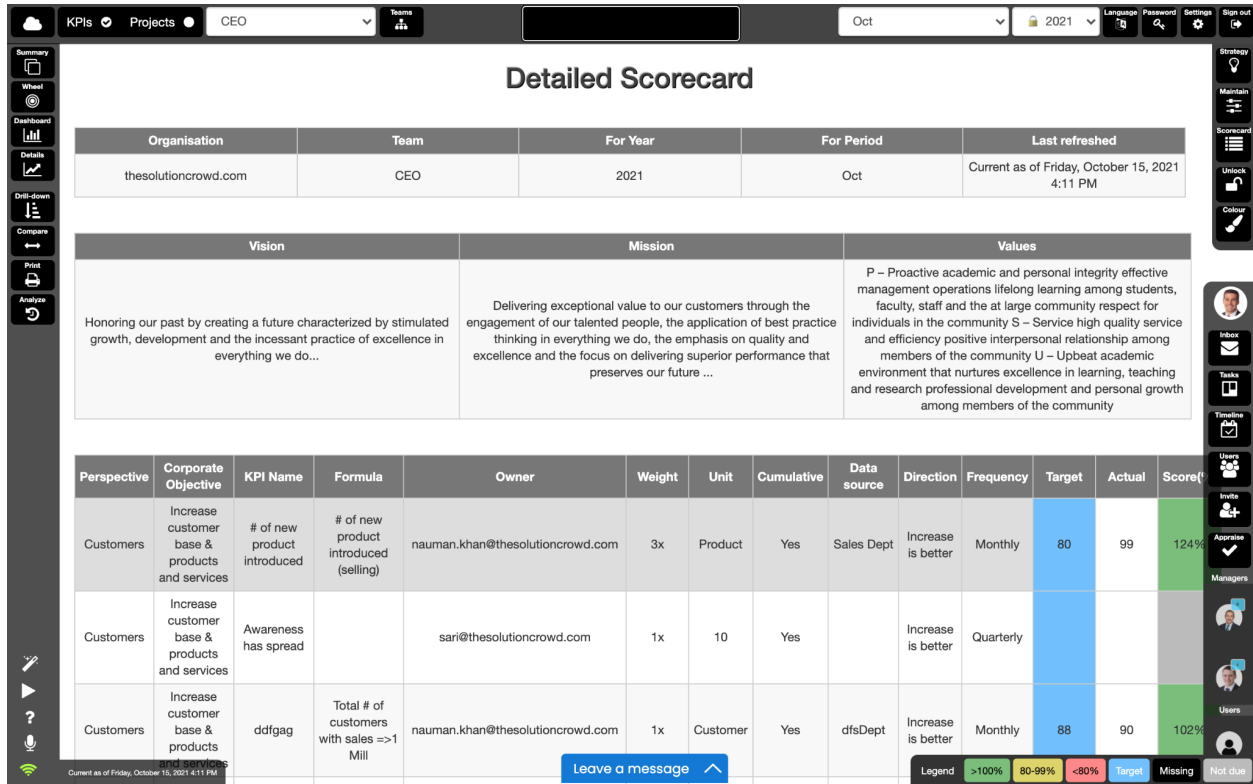


Compare

| | CEO | Business Support | MENA | Operations | Information Technology | Human Resources | Sales | Ak |
|---|--------|------------------|--------|------------|------------------------|-----------------|--------|--------|
| Perspective Customers | 101.9% | 101.5% | 101.5% | 101.5% | 101.5% | 101.5% | 53.5% | 101.5% |
| Objective Increase customer base & products and services | 108.4% | 101.5% | 101.5% | 101.5% | 101.5% | 101.5% | 42.3% | 101.5% |
| Objective Provide quality & innovative customer service | 91% | 101.5% | 101.5% | 101.5% | 101.5% | 101.5% | 57% | 101.5% |
| Perspective Finance | 80.9% | 112% | 90.3% | 106% | 100% | 120% | 83.2% | 101.5% |
| Objective Maximize revenues & returns from core and new business | 84.4% | 101.5% | 101.5% | 101.5% | 101.5% | 101.5% | 101.5% | 101.5% |
| Objective Optimize capital & operating expenditure | 75% | 112% | 112% | 93.5% | 100% | 120% | 100% | 101.5% |
| Perspective Internal Process | 77.3% | 72% | 100% | 113% | 84.5% | 126% | 57.6% | 101.5% |
| Objective Build effective organization governance | 77.3% | 72% | 100% | 113% | 84.5% | 126% | 57.6% | 101.5% |
| Objective Improve & automate efficient processes | 77.3% | 72% | 100% | 113% | 84.5% | 126% | 57.6% | 101.5% |
| Perspective People | 105.5% | 136.5% | 78.5% | 108.7% | 125% | 83.8% | 79.7% | 101.5% |
| Objective Attract & retain & develop capable talent | 100% | 73% | 75% | 125% | 125% | 75% | 75% | 101.5% |
| Objective Build a performance driven culture | 111% | 200% | 82% | 100.5% | 125% | 86.7% | 82% | 101.5% |

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

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

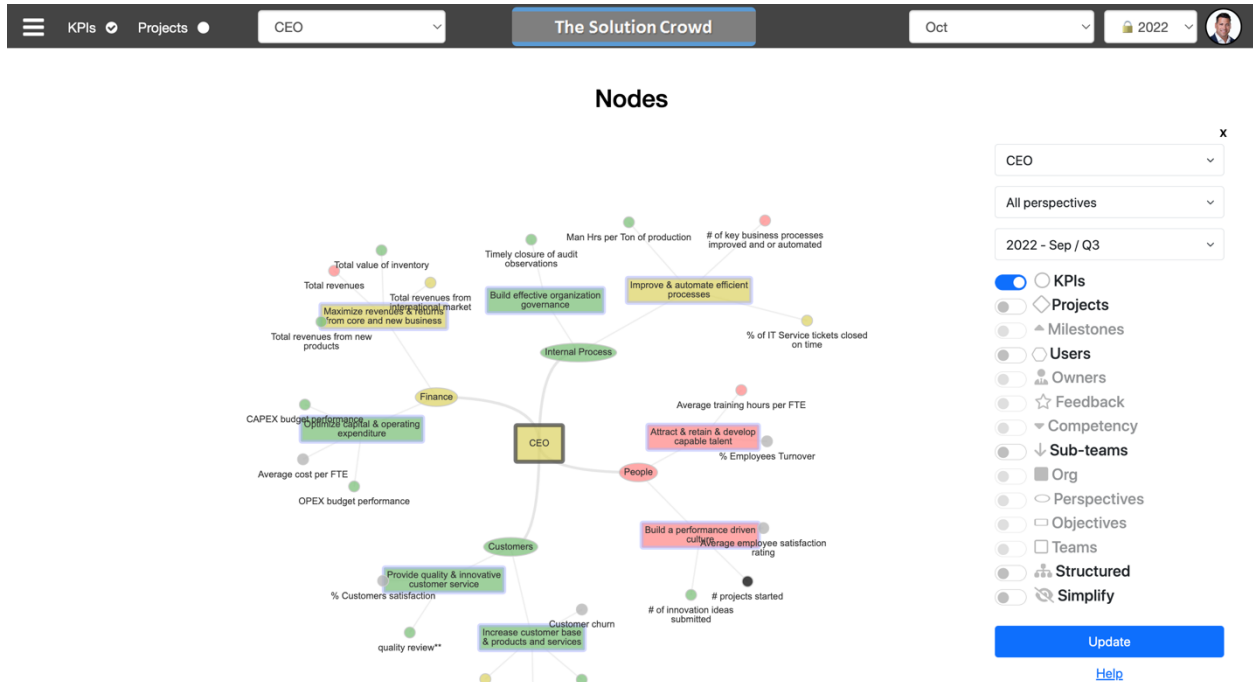


Analyze

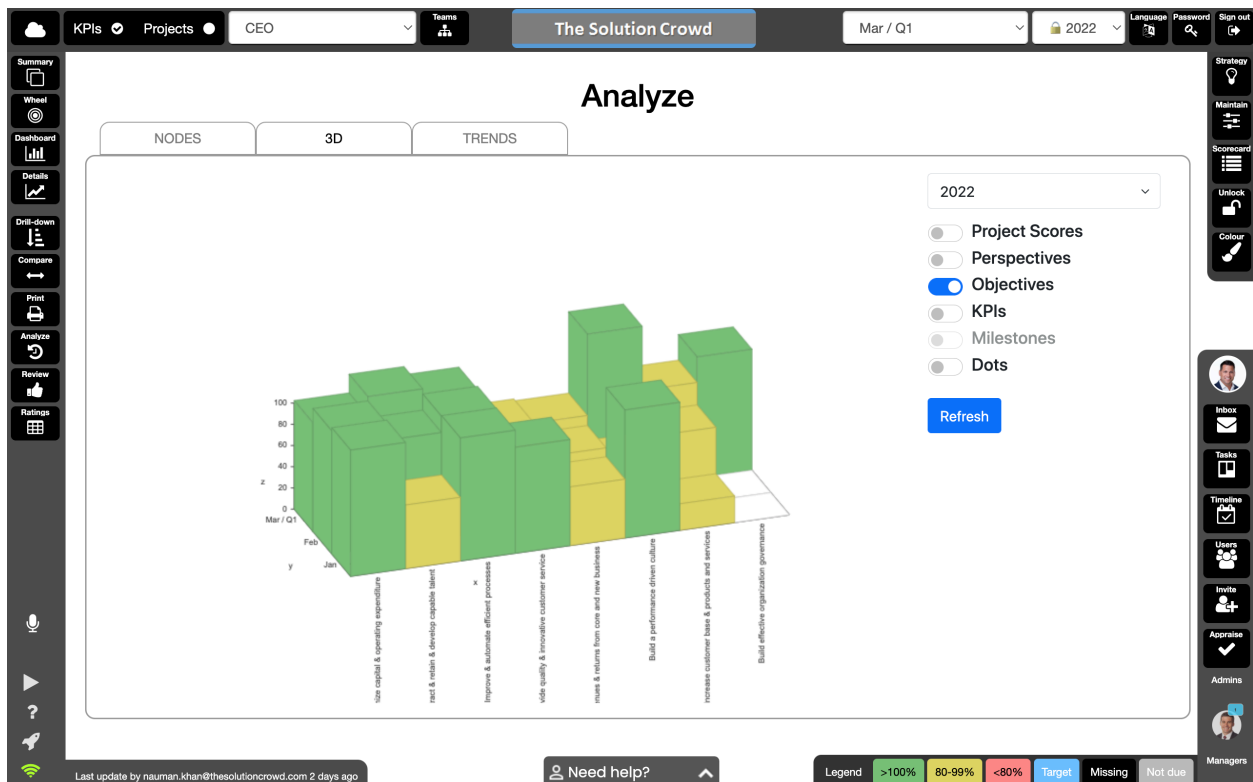
You can analyze your data by different dimensions.



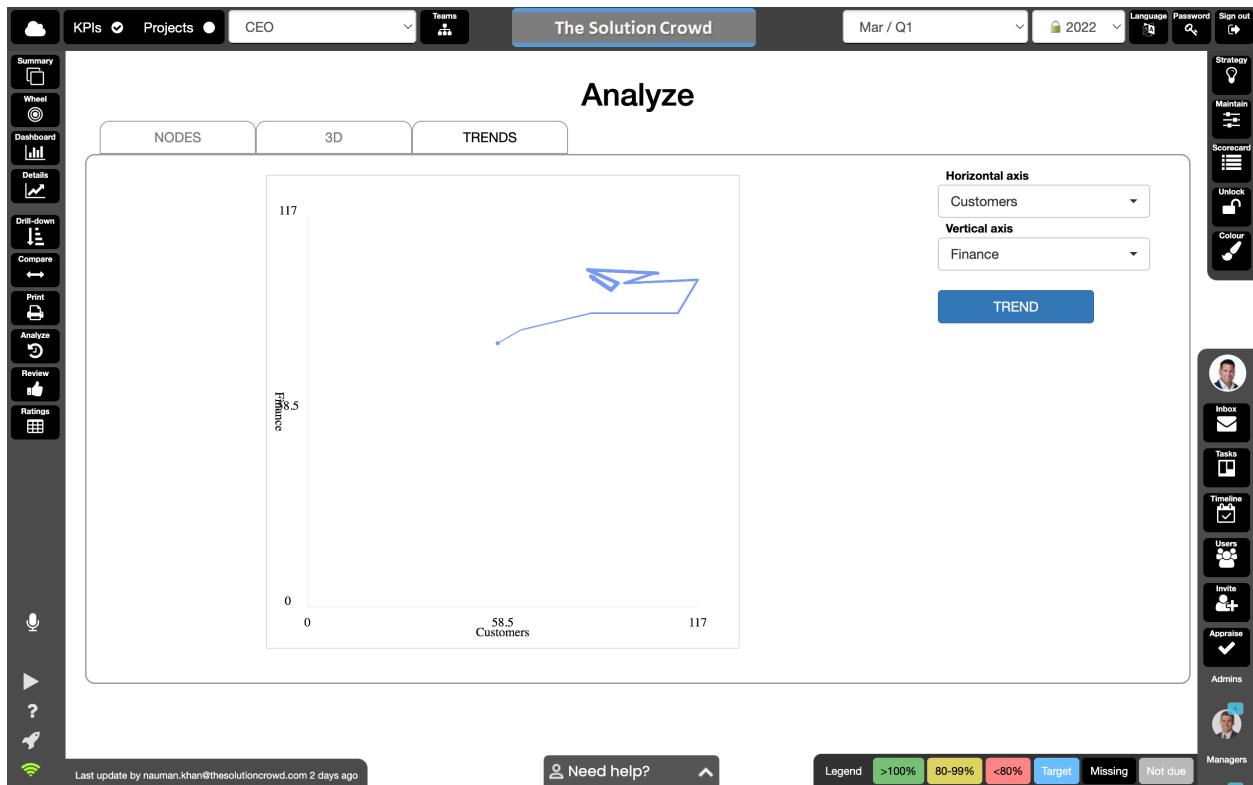
Kippy – Features



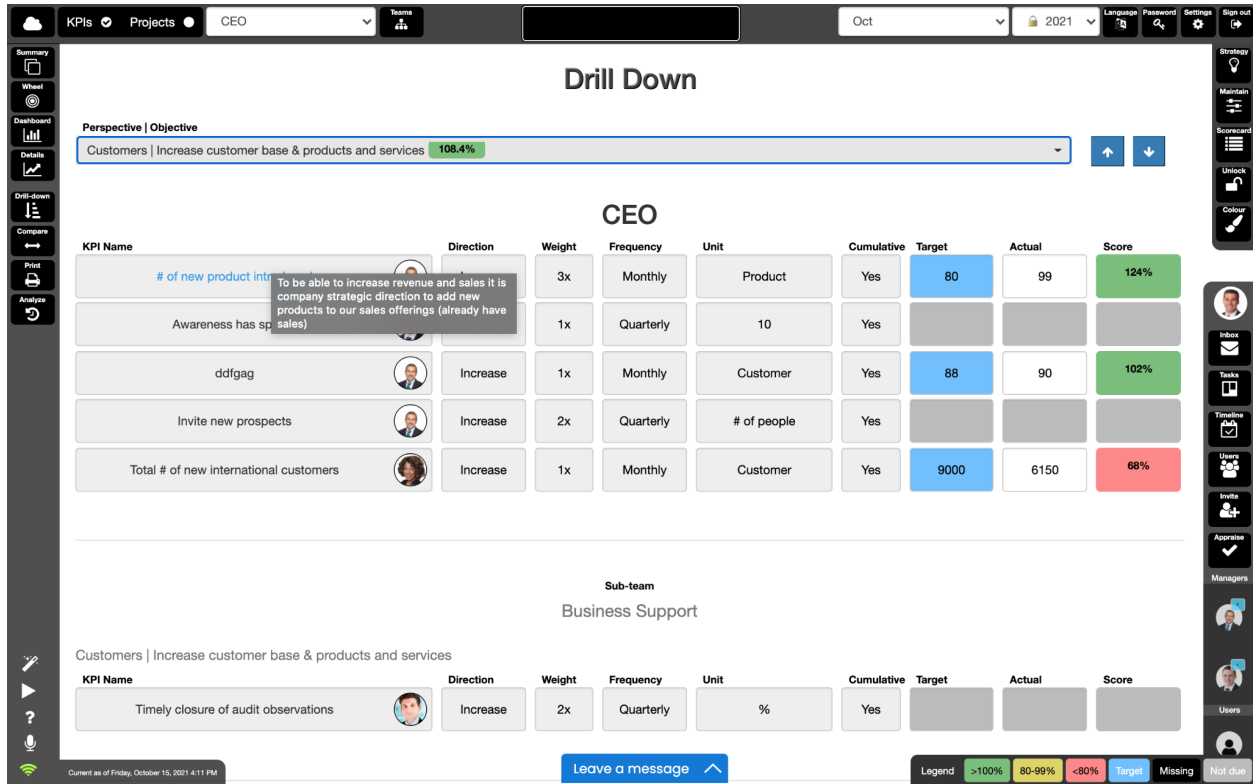
Interact, filter, drill-down and animate the nodes using your mouse. Hover over the filters to learn more.



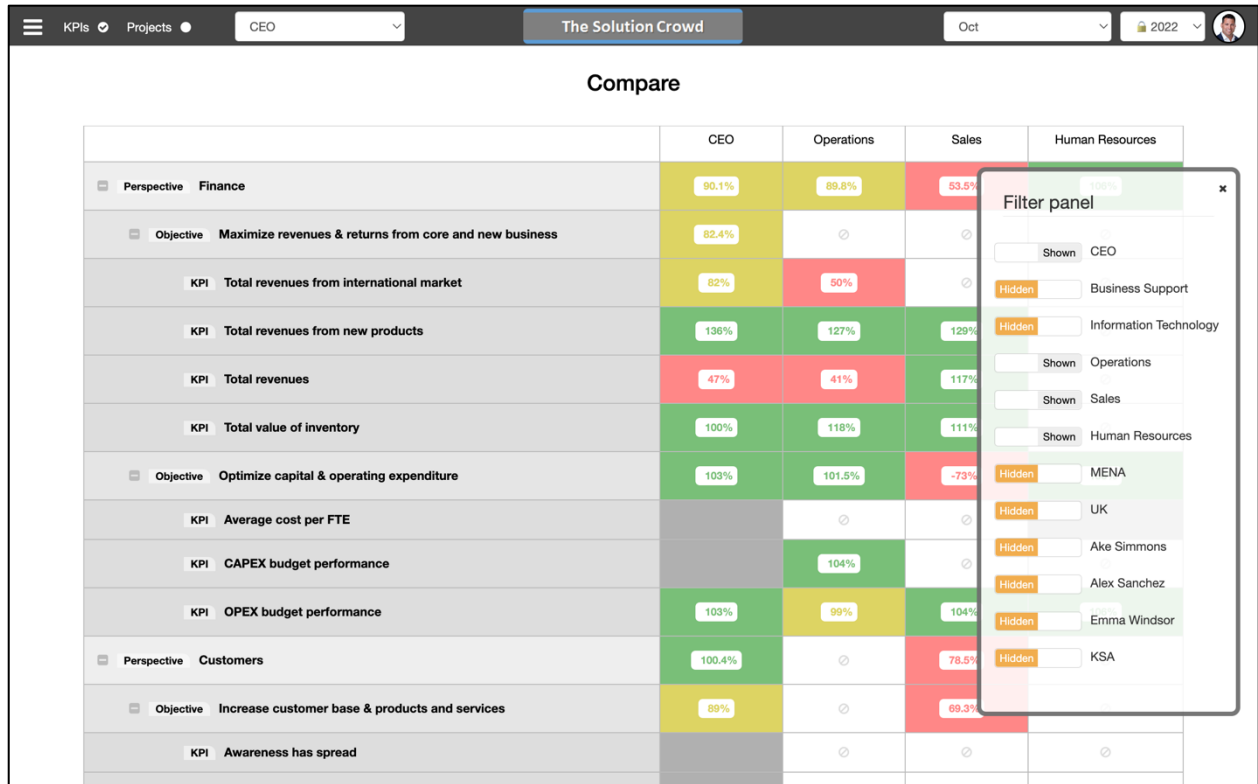
Drag with your mouse to change the perspective. Hover over the filters to learn more.



Compare how two items are trending over the year.



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

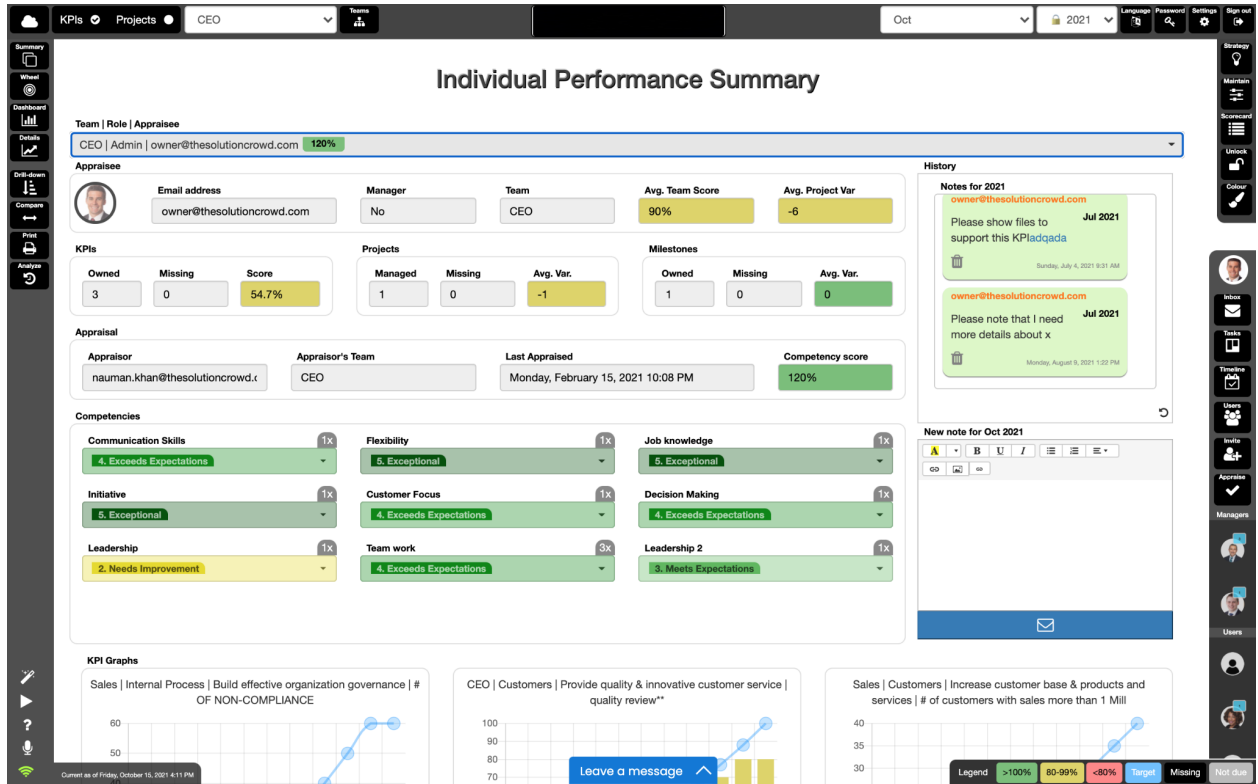


| | CEO | Operations | Sales | Human Resources |
|---|--------|------------|-------|-----------------|
| Perspective Finance | 90.1% | 89.8% | 83.5% | 100% |
| Objective Maximize revenues & returns from core and new business | 82.4% | ? | ? | ? |
| KPI Total revenues from international market | 82% | 50% | ? | ? |
| KPI Total revenues from new products | 136% | 127% | 129% | ? |
| KPI Total revenues | 47% | 41% | 117% | ? |
| KPI Total value of inventory | 100% | 118% | 111% | ? |
| Objective Optimize capital & operating expenditure | 103% | 101.5% | -73% | ? |
| KPI Average cost per FTE | | ? | ? | ? |
| KPI CAPEX budget performance | | 104% | ? | ? |
| KPI OPEX budget performance | 103% | 99% | 104% | ? |
| Perspective Customers | 100.4% | ? | 78.5% | ? |
| Objective Increase customer base & products and services | 89% | ? | 69.3% | ? |
| KPI Awareness has spread | | ? | ? | ? |

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

Staff performance

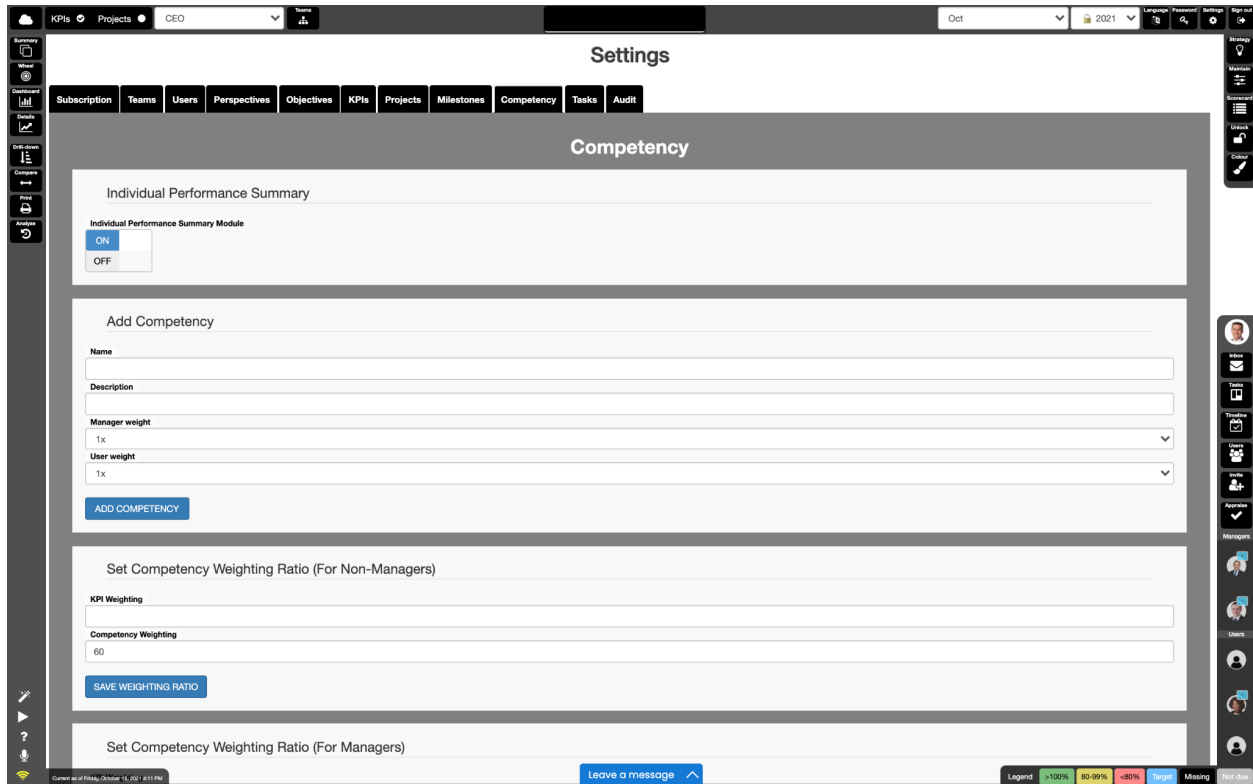
The individual performance summary of each employee shows the live calculated performance score of that employee, in relation to their weighted score based on their forecast and actuals, for all individual and team KPI and milestones they are responsible for.



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.

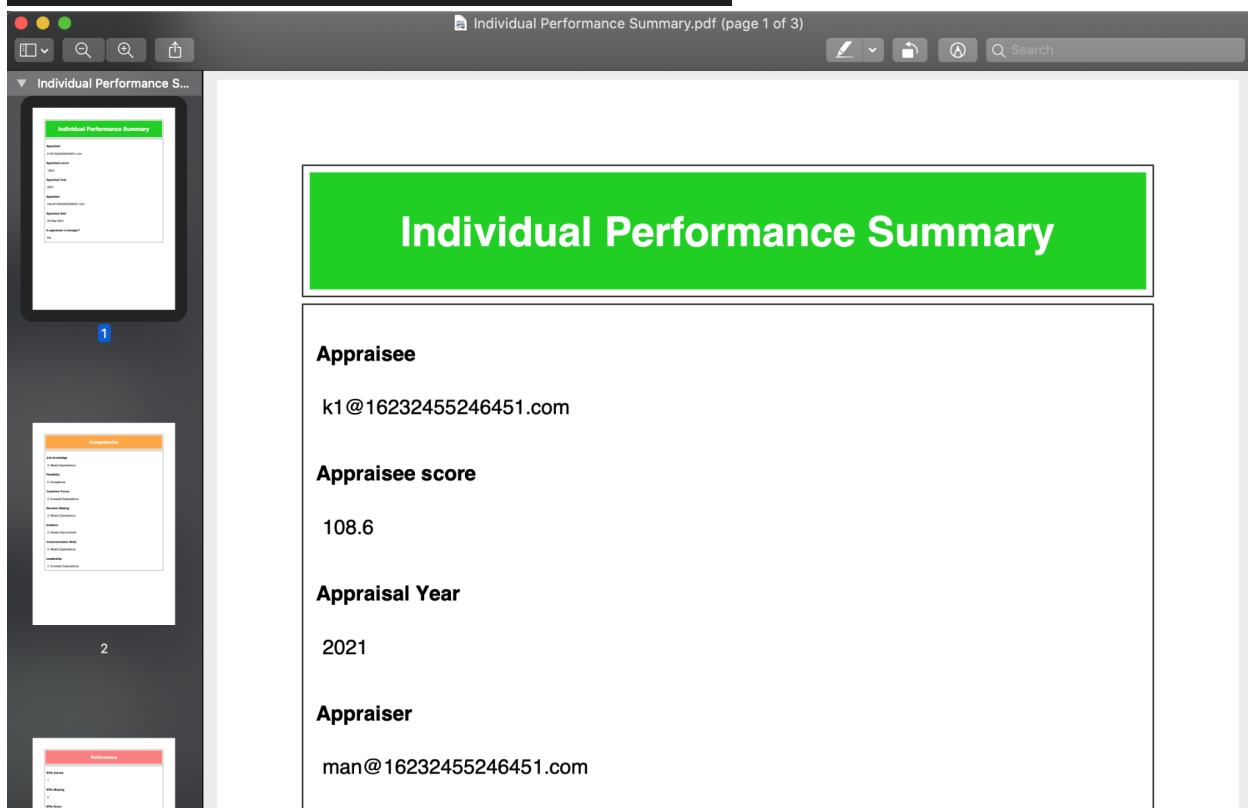
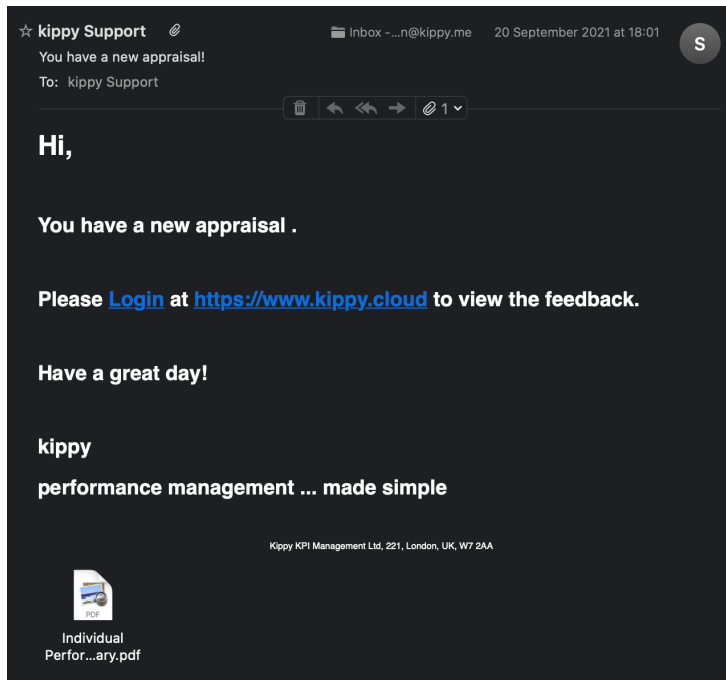


The screenshot displays the 'Settings' page in the Kippy application, specifically the 'Competency' section. The page is divided into several sections:

- Individual Performance Summary:** A toggle switch for the 'Individual Performance Summary Module' is currently set to 'ON'.
- Add Competency:** A form with fields for 'Name', 'Description', 'Manager weight' (set to '1x'), and 'User weight' (set to '1x'). A blue 'ADD COMPETENCY' button is at the bottom.
- Set Competency Weighting Ratio (For Non-Managers):** Fields for 'KPI Weighting' and 'Competency Weighting' (set to '60'). A blue 'SAVE WEIGHTING RATIO' button is at the bottom.
- Set Competency Weighting Ratio (For Managers):** A section for setting weighting ratios for managers, currently empty.

The bottom of the page features a 'Leave a message' button and a legend for performance levels: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (white).

- 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

| | | | | | |
|--|--|----------------------|--------------------|-------------------------------|-------------------------------|
| | Email address bob@thesolutioncrowd.c | Manager No | Team CEO | Avg. Team Score 90% | Avg. Project Var -6 |
|--|--|----------------------|--------------------|-------------------------------|-------------------------------|

KPIs

| | | |
|-------------------|---------------------|---------------------|
| Owned 1 | Missing 0 | Score 60% |
|-------------------|---------------------|---------------------|

Projects

| | | |
|---------------------|---------------------|-------------------------|
| Managed 0 | Missing 0 | Avg. Var. n/a |
|---------------------|---------------------|-------------------------|

Milestones

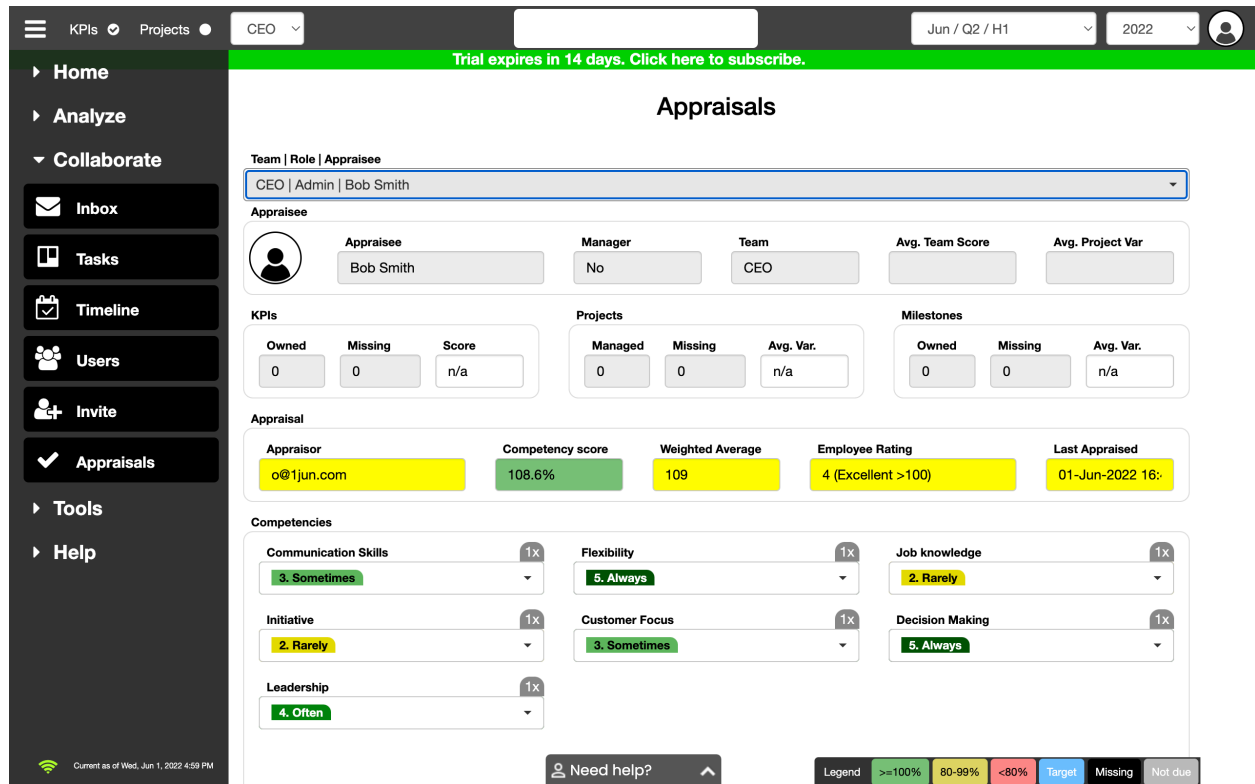
| | | |
|-------------------|---------------------|-------------------------|
| Owned 0 | Missing 0 | Avg. Var. n/a |
|-------------------|---------------------|-------------------------|

Appraisal

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

Self appraisals

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



The screenshot shows the 'Appraisals' section of the Kippy dashboard. The interface includes a sidebar with navigation options: Home, Analyze, Collaborate, Inbox, Tasks, Timeline, Users, Invite, Appraisals, Tools, and Help. The main content area displays a form for creating or editing an appraisal for 'Bob Smith' (CEO). The form includes sections for KPIs, Projects, Milestones, Appraisal details (Appraiser, Competency score, Weighted Average, Employee Rating, Last Appraised), and Competencies (Communication Skills, Initiative, Leadership, Flexibility, Customer Focus, Job knowledge, Decision Making). A legend at the bottom indicates color-coded performance levels: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

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

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



Employee Ratings

HR Report

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

Employee Rating Report

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

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



Employee Rating Report

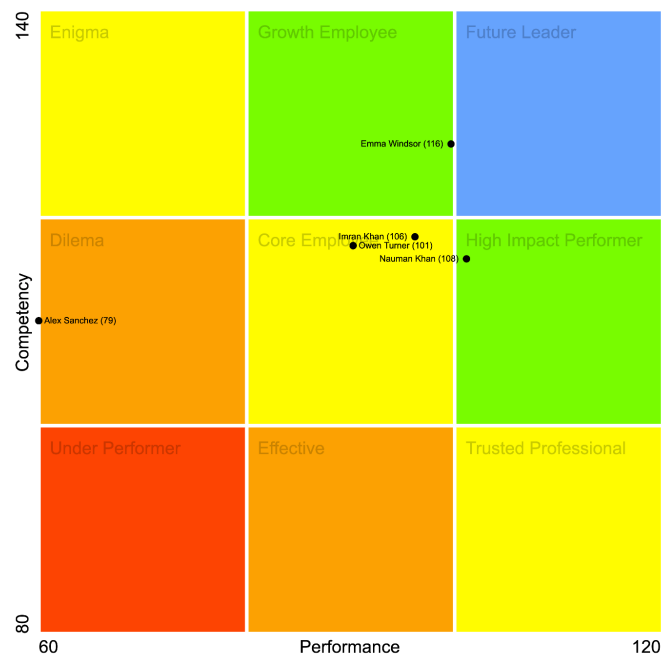
| Employee email | Is manager | KPI Score | Comp Score | Avg | Weighted Avg | Rating |
|-------------------------------------|------------|-----------|------------|-----|--------------|--------------------|
| lina@thesolutioncrowd.com | Yes | | | | | |
| alex.sanchez@thesolutioncrowd.com | No | 0 | |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

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

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



The 9-Box Grid



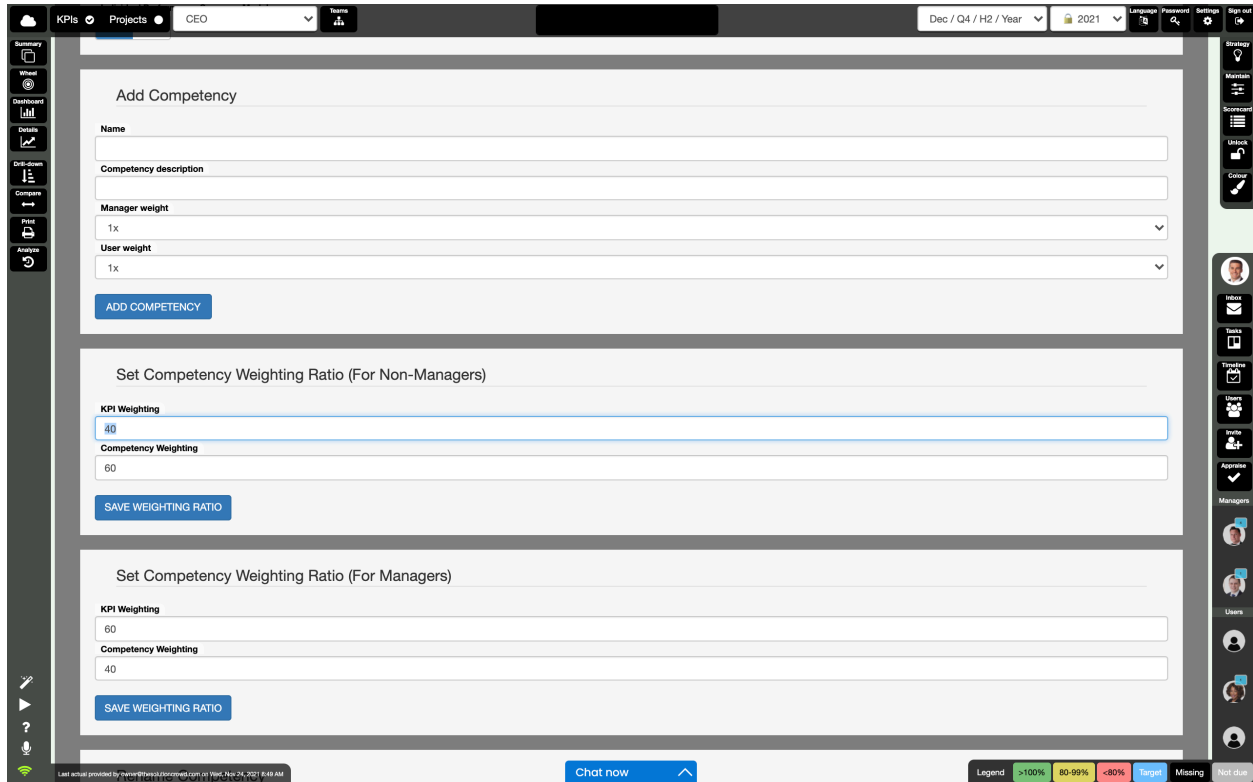


The screenshot shows the Kippy application interface. At the top, there's a navigation bar with 'KIPis' and 'Projects' tabs, a dropdown menu showing 'CEO', and a section for 'The Solution Crowd' with a date selector set to 'Jul' and '2022'. A user profile icon is in the top right. On the left, a dark sidebar contains a menu with options: Home, Analyze, Collaborate, Manage, Tools, Maintain, Unlock, Colour, Microapps, Voice control, Print, Language, Password, Settings, Sign out, and Help. The main content area is titled 'Settings' and has a sub-header 'Reports'. Below this, a horizontal tab bar includes 'Setup', 'Subscription', 'Teams', 'Users', 'Perspectives', 'Objectives', 'KPIs', 'Projects', 'Milestones', 'Competency', 'Tasks', 'Audit', 'Integrations', and 'Reports'. The 'Reports' tab is active, showing the '9-Box Grid' settings. These settings include input fields for '9-Box Grid colours', '9-Box Grid labels', 'KPI scale minimum' (60), 'KPI scale maximum' (120), 'Competency scale minimum' (80), and 'Competency scale maximum' (140). A 'SAVE 9-BOX GRID SETTINGS' button is at the bottom of the form. On the right side of the main content area, there's a vertical 'Managers' list with user avatars and a 'Users' section below it. At the bottom of the page, there's a 'Need help?' button and a legend bar with color-coded boxes for '>=100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.

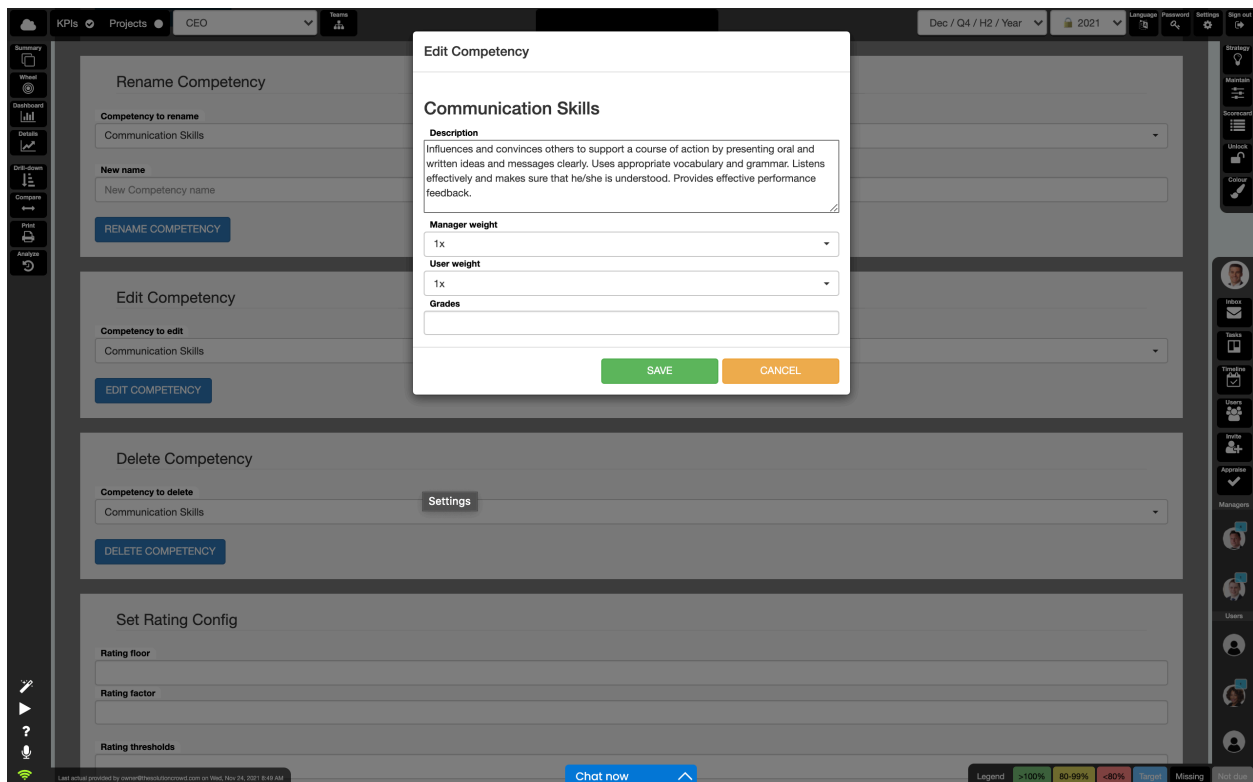
Competencies, grades and weightings

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

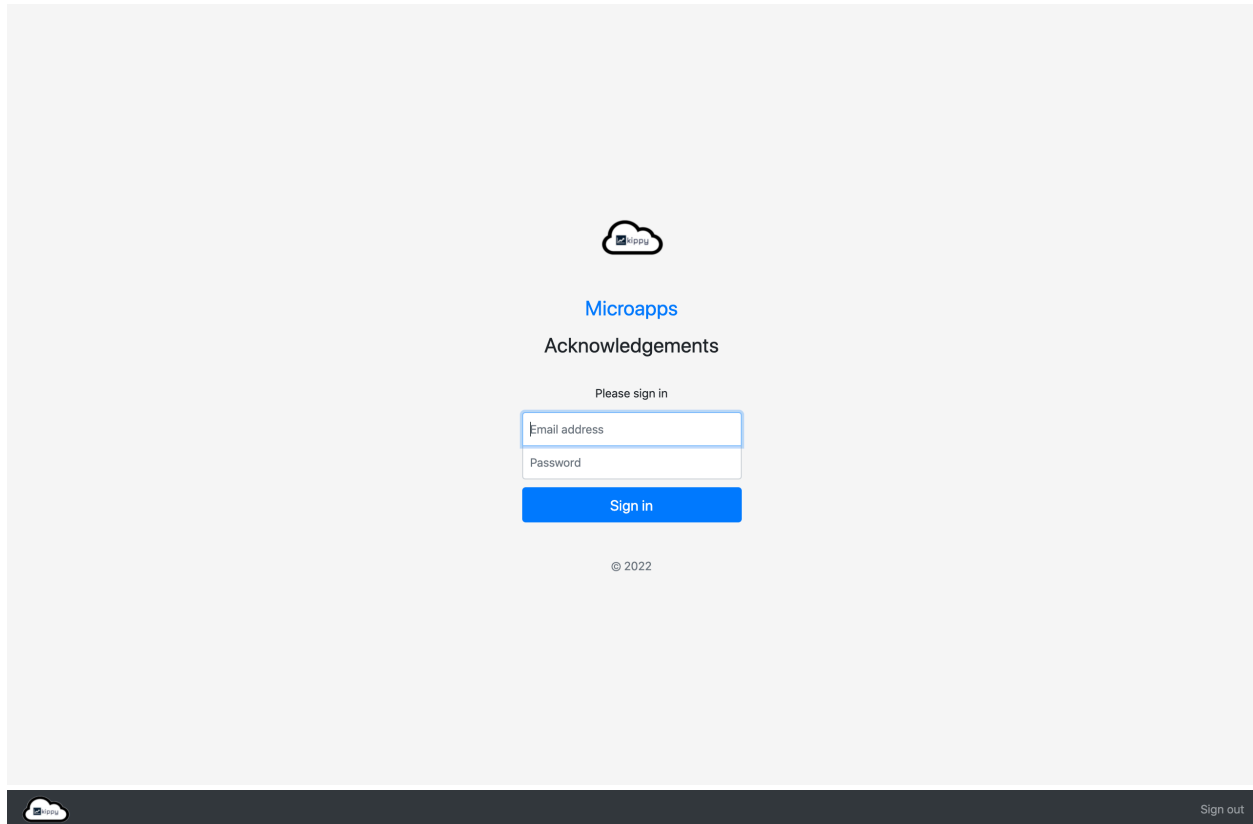
Rating thresholds

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.



Kippy – Features

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 displays the 'Individual Performance Summary' screen in the Kippy application. The top navigation bar includes 'KPIs', 'Projects', 'Sales', and 'Teams'. The main content area is titled 'Acknowledgements' and lists several feedback entries with star ratings and timestamps. The bottom section shows 'KPI Graphs' with four charts for 'Sales | People | o3 | k4', 'Sales | Finance | o2 | k3', 'Sales | Process | o4 | k5', and 'Sales | Finance | o2 | k2'. A legend at the bottom right indicates performance levels: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

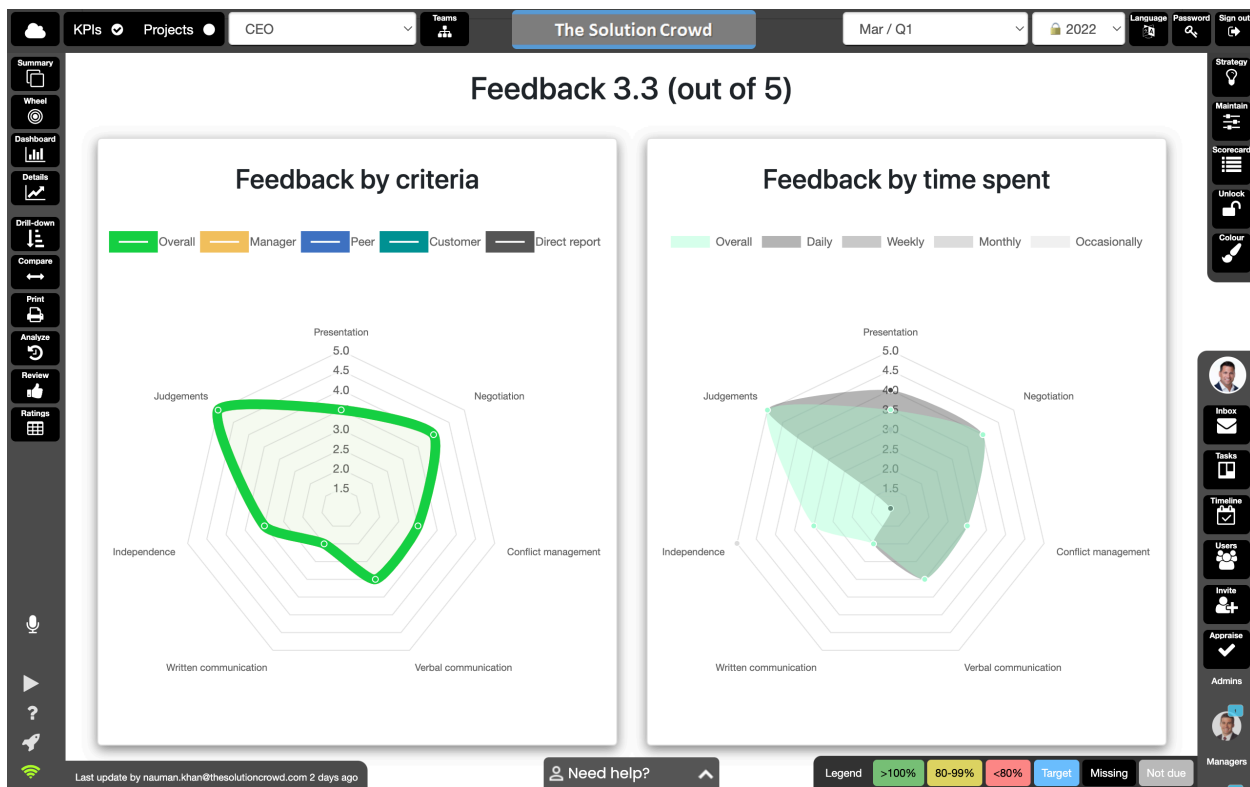


The feedback can also be left via the main kippy app clicking on a user's avatar.

The feedback criteria are configurable in the setting screen.

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

The feedback is summarized in interactive radar graphs per employee.



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

Employee Rating Report

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

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




Risk Management

Risk Report

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

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



Sign out

Risk Report (Jun 2022)

Team-level risks

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

|

Project-level risks

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

Task-level risks

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

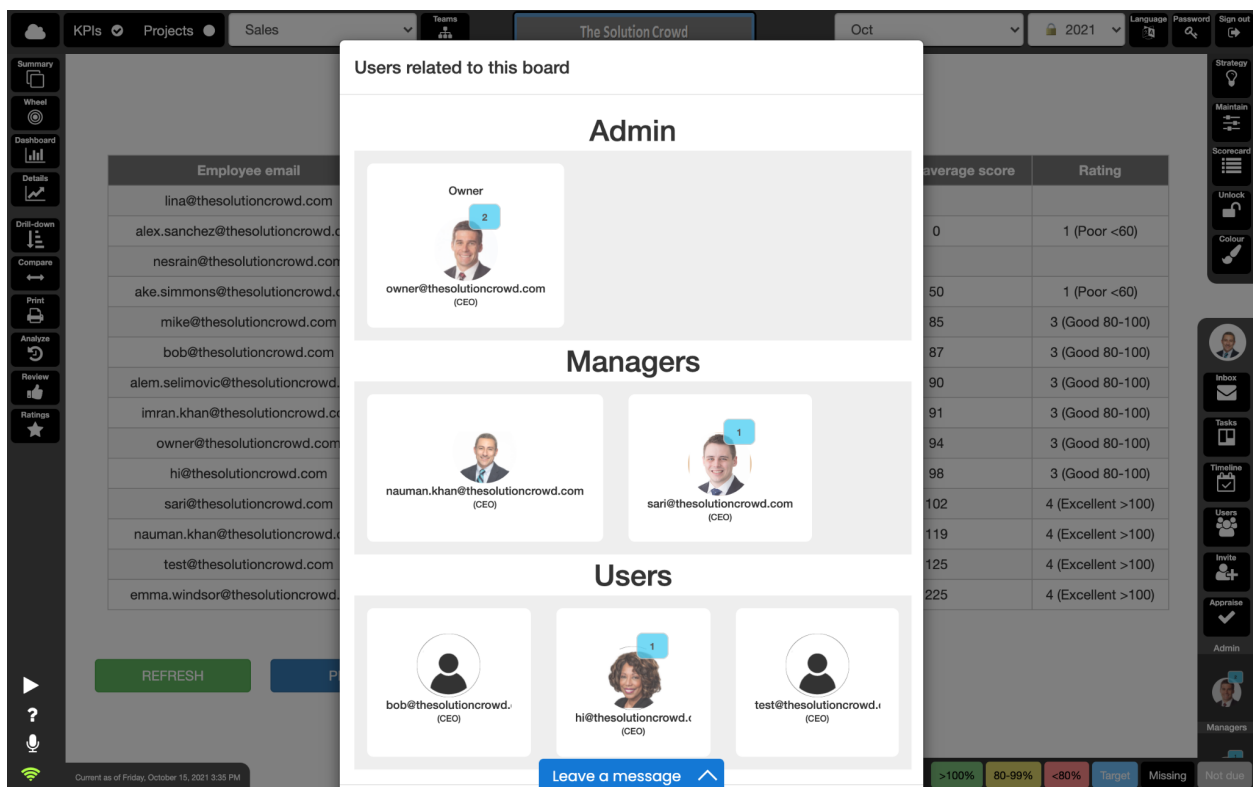
Generated: Mon Jun 20 10:33:12 UTC 2022

Governance

All this is controlled with automated governance.

Roles

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



The screenshot displays the Kippy dashboard interface. A modal window titled "Users related to this board" is open, showing three categories of users: Admin, Managers, and Users. The Admin section lists the Owner (owner@thesolutioncrowd.com, CEO) with a notification badge of 2. The Managers section lists nauman.khan@thesolutioncrowd.com (CEO) and sari@thesolutioncrowd.com (CEO), both with notification badges of 1. The Users section lists bob@thesolutioncrowd.com (CEO), hi@thesolutioncrowd.com (CEO), and test@thesolutioncrowd.com (CEO), with notification badges of 1, 1, and 1 respectively. The background dashboard shows a table of employee emails, a "REFRESH" button, and a "Leave a message" button at the bottom. The right sidebar contains various navigation and utility icons.

Managers have additional screen to perform HR functions.

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

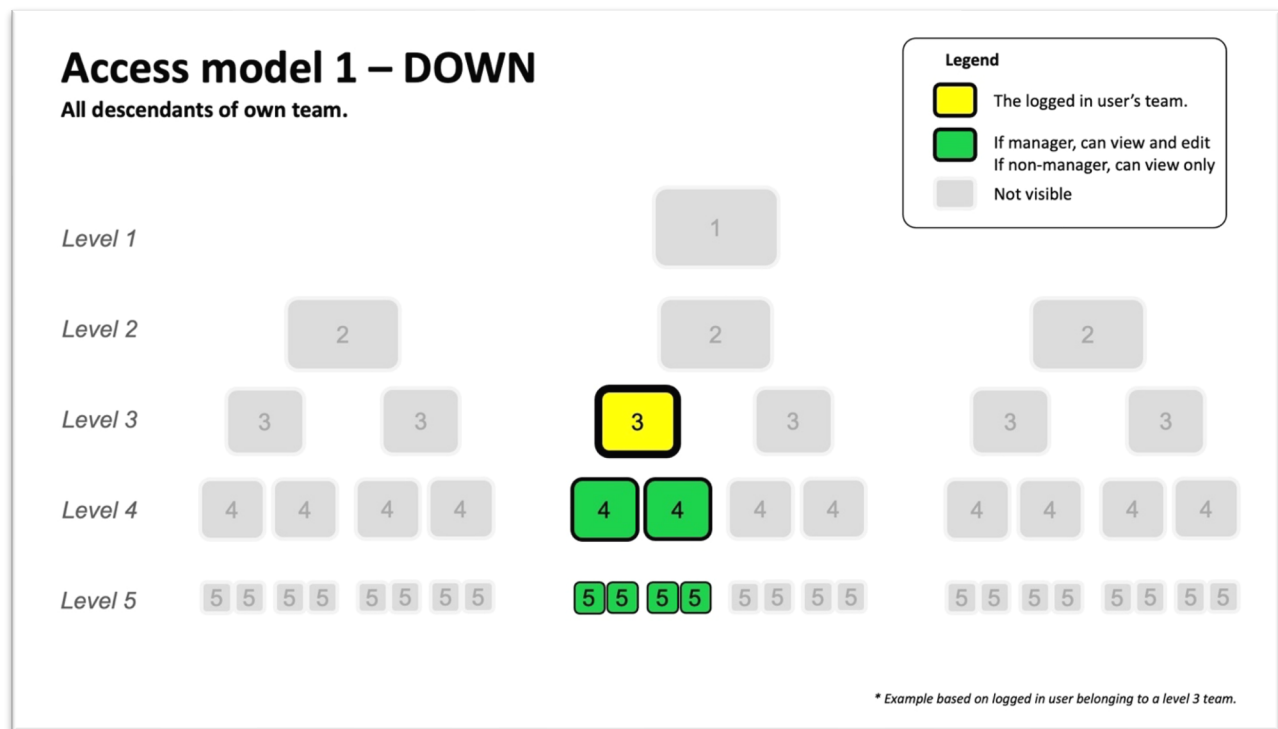
Team visibility model

Access mode

DOWN: All descendants of own team.

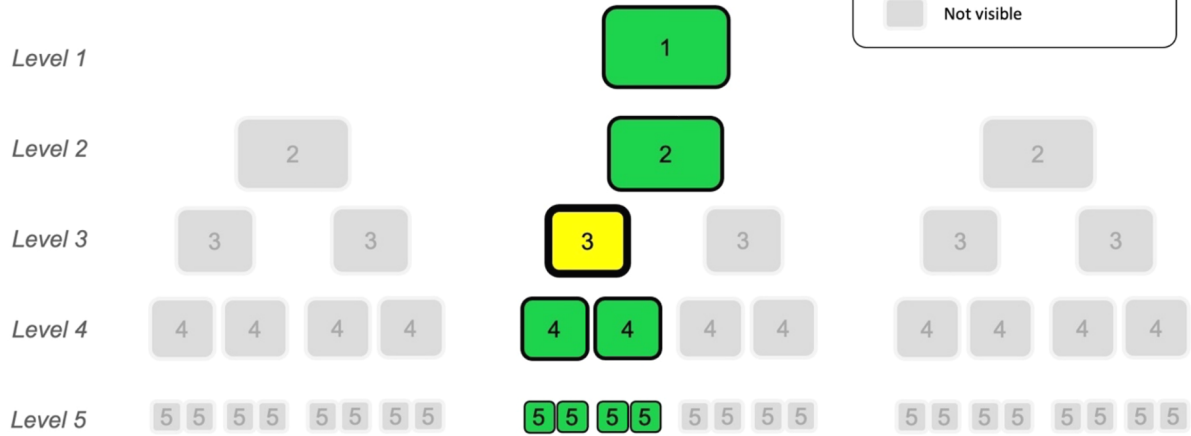
SAVE ACCESS MODE

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



Access model 2 – UP-DOWN

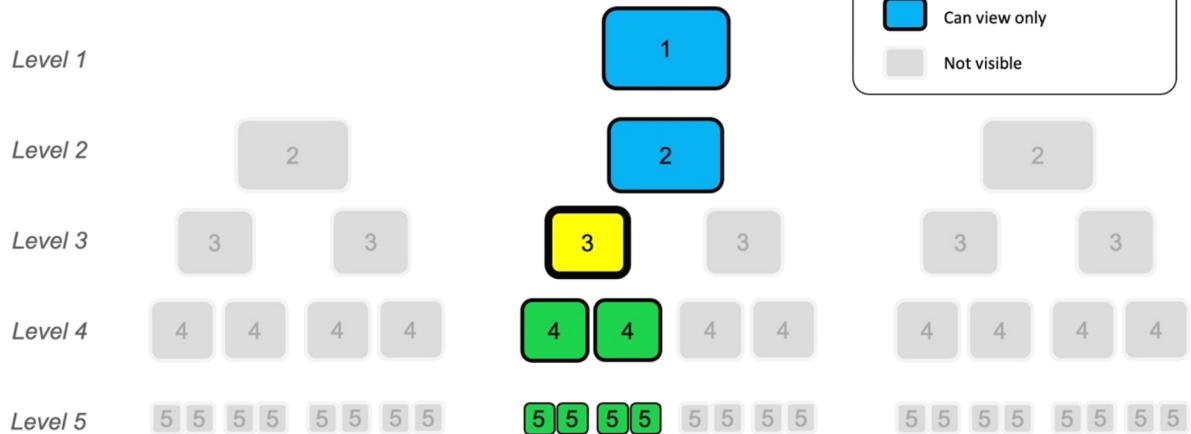
All descendants of own team. Plus, direct ancestors of own team, and managers can edit those ancestors.



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

Access model 3 – UP-DOWN RESTRICTED

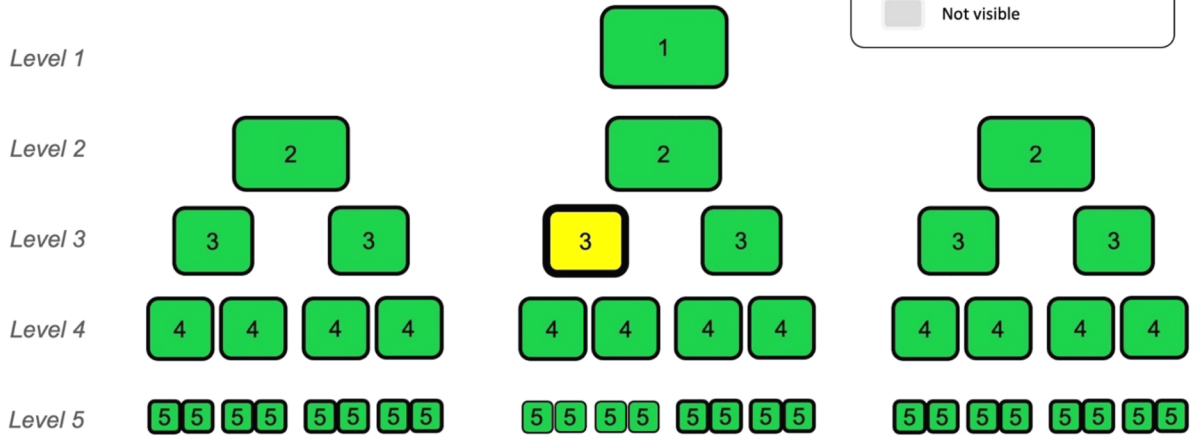
All descendants of own team. Plus, direct ancestors of own team, but managers can not edit those ancestors.



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

Access model 4 – FULL

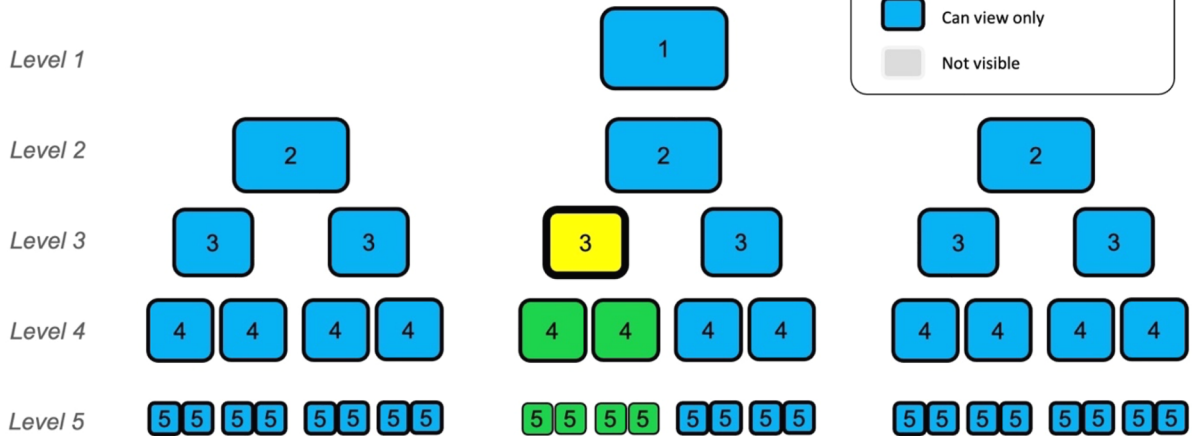
All teams, anywhere in the organisation. Managers can edit any team.



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

Access model 5 – FULL RESTRICTED

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



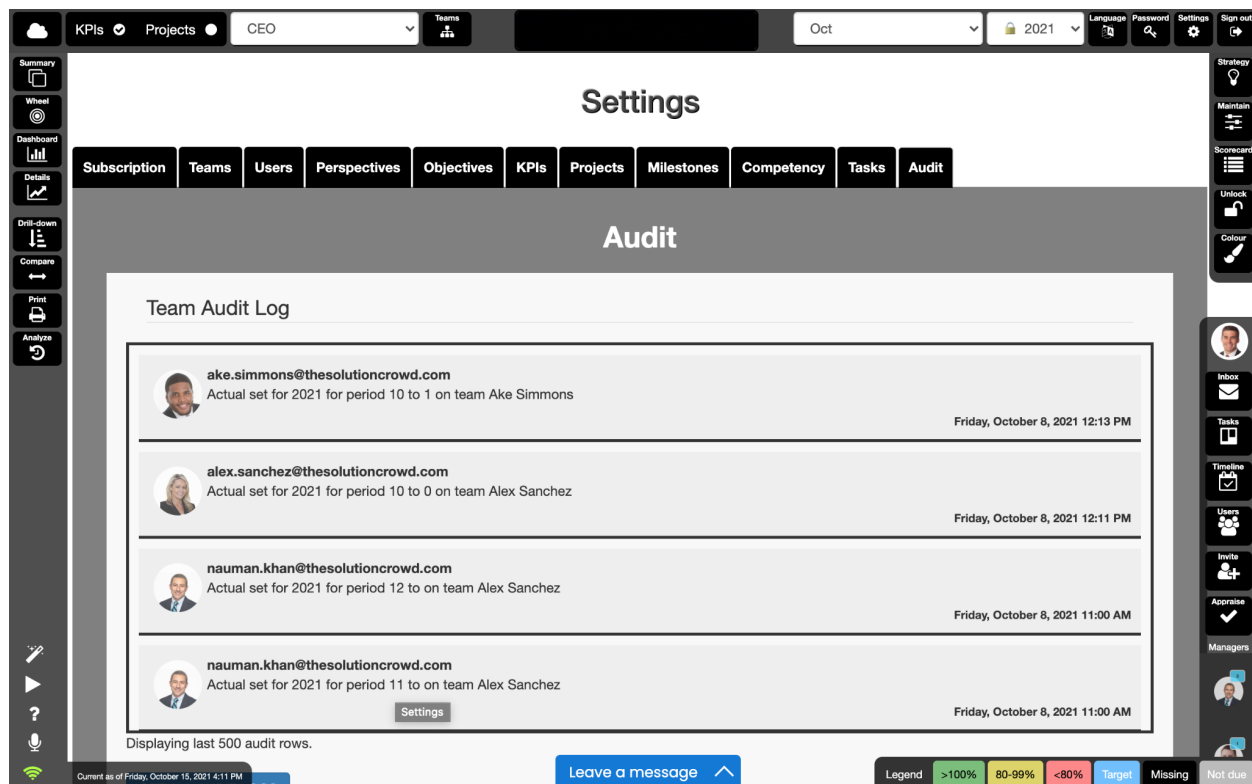
* Example based on logged in user belonging to a level 3 team.



Auditing

Every change is automatically audited in an immutable log.

System owners can review the system-wide audit log.



The screenshot displays the 'Settings' page in the Kippy application, specifically the 'Audit' section. The top navigation bar includes 'KPIs', 'Projects', and a dropdown menu for 'CEO'. The 'Audit' section is titled 'Team Audit Log' and shows a list of audit entries. Each entry includes a user profile picture, email address, a description of the change, and a timestamp. The entries are as follows:

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

Below the list, it states 'Displaying last 500 audit rows.' and includes a 'Settings' button. The bottom of the page features a 'Leave a message' button and a legend for performance metrics: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

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



Home

Strategy

Teams

Summary

Wheel

Dashboard

Scorecard

Details

Analyze

Collaborate

Manage

Tools

Help

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

100

90

80

70

60

50

40

30

20

10

0

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

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

New note for Jun / Q2 / H1 2022

A

B

U

I

Need help?

Legend

>=100%

80-99%

<80%

Target

Missing

Not due

Admins

Users



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.



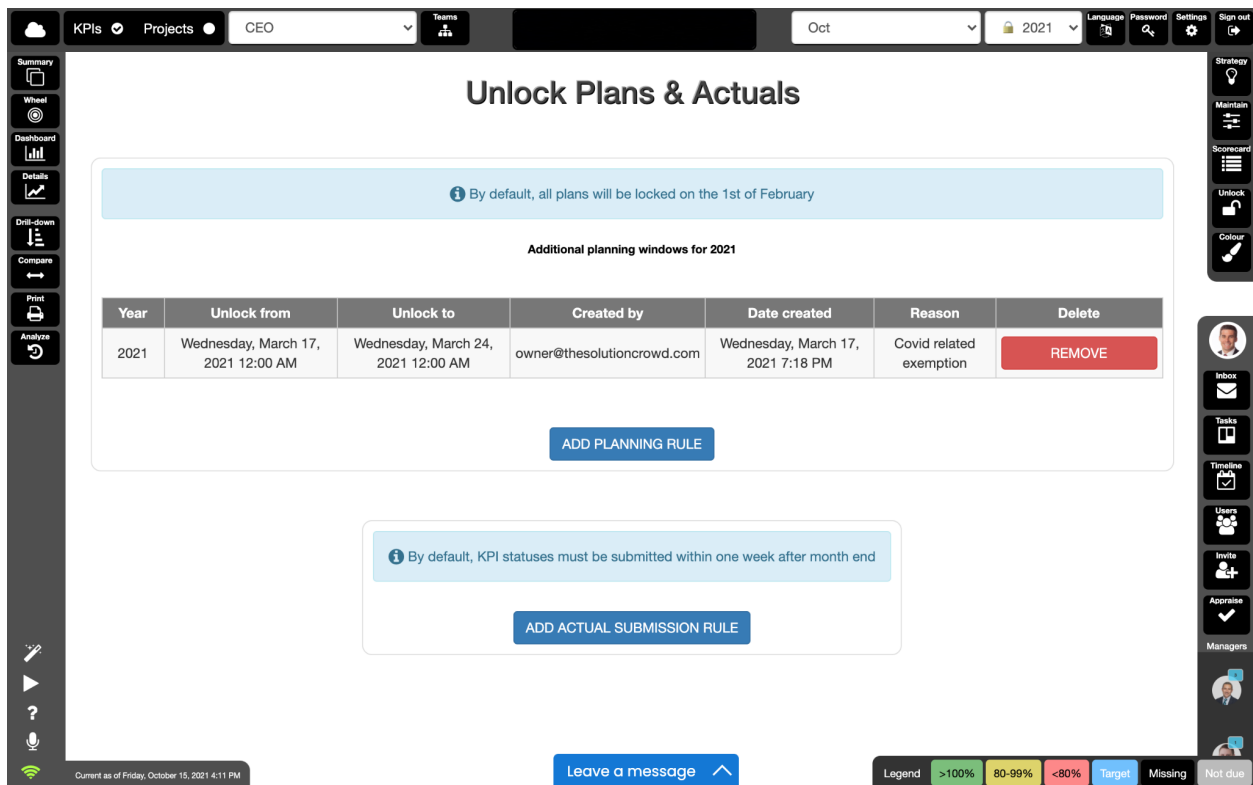
Kippy – Features

The screenshot displays the Kippy application interface. On the left is a dark sidebar with navigation options: Home, Analyze, Collaborate, Inbox, Tasks, Timeline, Users, Invite, Appraisals, Manage, Tools, and Help. The main content area shows a 'History' section with an 'Audit Log' containing two entries from 'm@4bjun2022.com' dated 'Sat, Jun 4, 2022 7:33 AM'. Each entry provides a detailed appraisal of a user, including a competency score (100% and 90% respectively), a weighted score (96 and 90), and a rating of 3 (Good 80-100). The appraisal text lists various skills and their performance levels, such as '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'', and 'Flexibility = '3. Meets Expectations''. Above the audit log, there are buttons for 'CANCEL' and 'SAVE COMPETENCIES'. At the bottom, there is a 'KPI Graphs' section with a legend indicating performance ranges: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey). A 'Need help?' button is also visible.

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 dashboard interface. At the top, there's a navigation bar with tabs for KPIs, Projects, and CEO. A modal window titled "Add actual submission rule" is open, showing a "Range" field with the text "Fri, October 15, 2021 @ 00:00 - Fri, October 22, 2021 @ 00:00" and an empty "Reason" field. Below the modal, a table lists submission rules. The first row shows a rule for 2021, unlocked from Wednesday, March 17, 2021 12:00 AM to Wednesday, March 24, 2021 12:00 AM, created by owner@thesolutioncrowd.com, with a reason of "Covid related exemption" and a "REMOVE" button. Below the table, there's a button labeled "ADD PLANNING RULE". A message box states: "By default, KPI statuses must be submitted within one week after month end". Below this, there's another button labeled "ADD ACTUAL SUBMISSION RULE". At the bottom, there's a "Leave a message" button and a legend for KPI statuses: >100%, 80-99%, <80%, Target, Missing, and Not due.

Add actual submission rule

Range
Fri, October 15, 2021 @ 00:00 - Fri, October 22, 2021 @ 00:00

Reason

CANCEL **ADD ACTUAL SUBMISSION RULE**

| 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



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 Kippy Settings page. The top navigation bar includes 'KIPs', 'Projects', 'CEO', and 'Teams'. The main content area is titled 'Settings' and has a sub-header 'Setup'. Below this, there are two sections: 'Assisted setup' and 'Quick KPI Setup'. The 'Quick KPI Setup' section contains a table for adding KPIs. The table has columns for 'Approved', 'Objective *', 'KPI Name *', 'Direction *', 'Weight *', 'Frequency *', and 'Cumulative'. There are 6 rows of data. The first three rows are approved (checkbox checked), and the last three are not (checkbox unchecked). The 'KPI Name' column contains various entries, including '# of new product introduced', 'Awareness has spread', 'Customer churn', 'ddfgag', 'FFGFHFGFGH', and 'Invite new prospects'. The 'Direction' column shows 'Increase is better' for most, and 'Decrease is better' for one. The 'Weight' column shows values like 3x, 1x, and 2x. The 'Frequency' column shows 'Monthly', 'Quarterly', and 'Yearly'. The 'Cumulative' column shows 'Yes' for all. At the bottom of the table, there is a 'Leave a message' button and a legend for performance metrics: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

| | 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 |



Kippy – Features

The screenshot displays the Kippy application interface. At the top, there's a navigation bar with tabs for KPIs, Projects, and Teams. Below this, a table lists various KPIs with columns for ID, status, description, metric, trend, multiplier, frequency, and target. The table includes KPIs like 'Build effective organization governance', 'Improve & automate efficient processes', 'Attract & retain & develop capable talent', and 'Build a performance driven culture'. Below the table are buttons for 'SAVE', 'CANCEL', and 'ADD ROW'. Below the table is an 'Import team' section with a text box for instructions and a file upload area with a 'Choose file' button and an 'UPLOAD' button. The bottom of the screen features a 'Leave a message' button and a legend for performance metrics.

| ID | Status | Description | Metric | Trend | Multiplier | Frequency | Target |
|----|-------------------------------------|---|---|--------------------|------------|-------------|--------|
| 21 | <input type="checkbox"/> | Build effective organization governance | مخزون | 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 |

Import team

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

Please upload a **kippy template**

No file chosen

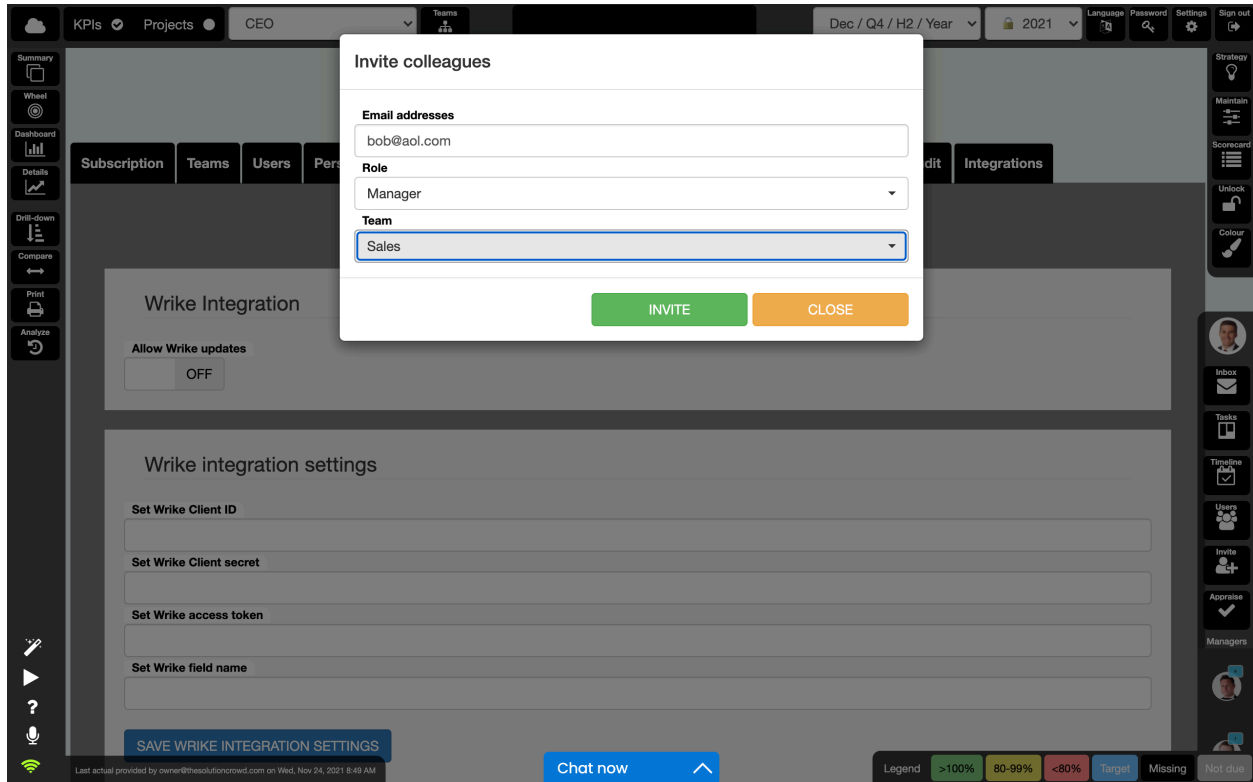
Legend: >100% 80-99% <80% Target Missing Not done

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.



 Sign out

User Report




Kippy Users (15)

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

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

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

Manage your own user profile


 KPIs  Projects 

CEO

The Solution Crowd

Sep / Q3

2022



Home

Strategy

Teams

Summary

Wheel

Dashboard

Scorecard

Details

Maintain

Analyze


Collaborate

Reports

Tools

Help

Last update Nauman Khan by 13 days ago



Need help?

Legend

>=100%

80-99%

<80%

Target

Missing

Not due

My profile

Email nauman.khan@thesolutioncrowd.com

Role Manager

User's team CEO

Alias norm_khan@hotmail.com

Name

Nauman Khan

Grade

Exec

Designation

CEO


Tree Depth

EDIT PROFILE


Voice-activated presentation mode ☐


Profile picture

Choose file No file chosen





Managers






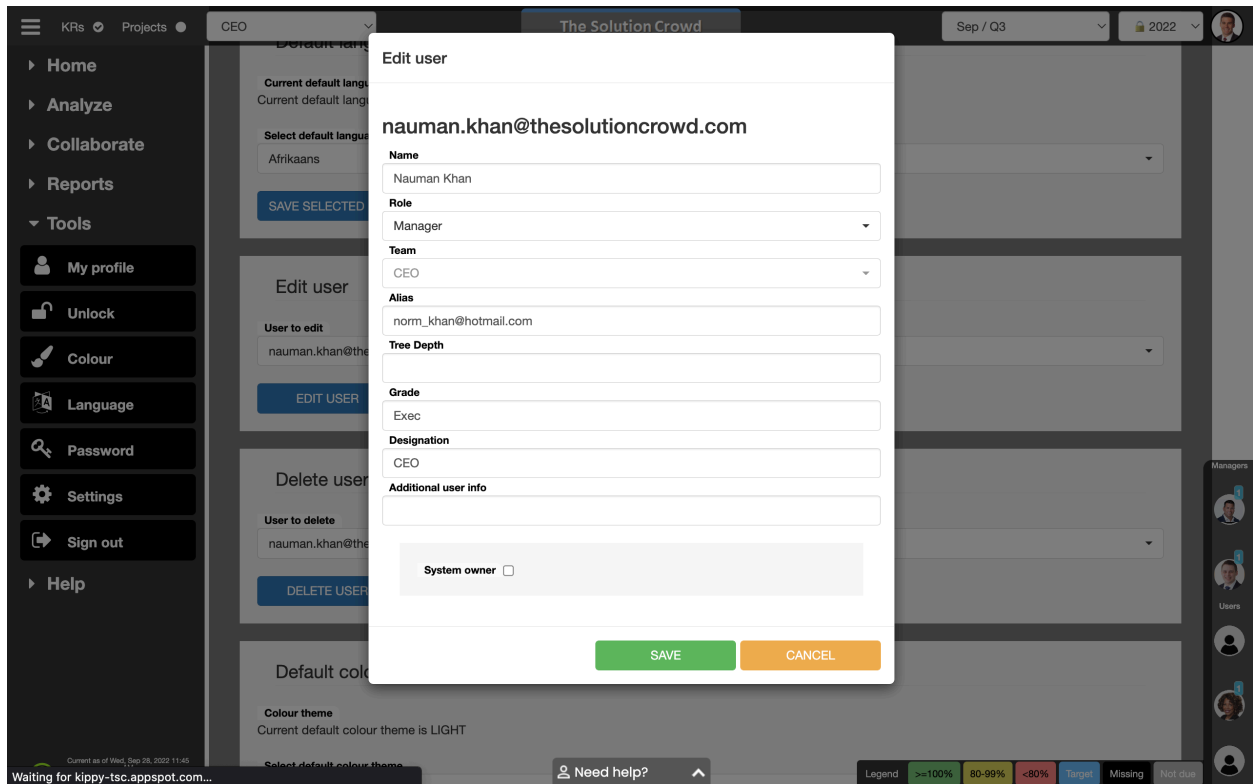
Users







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


Reminder

To: nauman.khan@thesolutioncrowd.com

2 October 2021 at 13:02

S

Reminder



Please update last months actuals for the following items

| Team | Project Milestone or KPI | Name |
|------|--------------------------|----------------------|
| CEO | KPI | Invite new prospects |

Log in

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

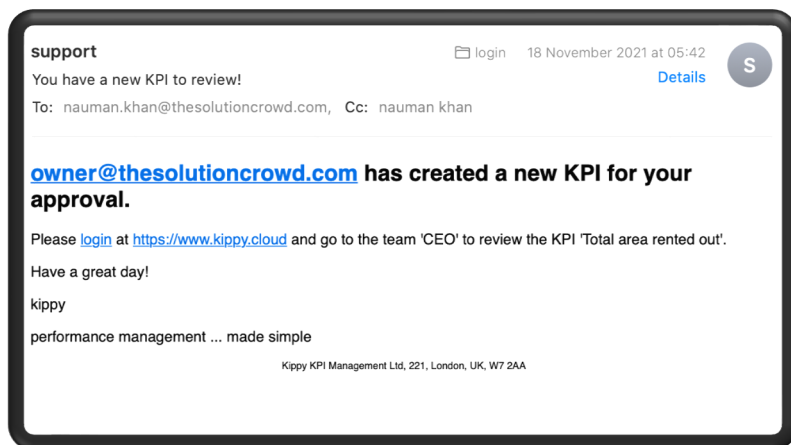
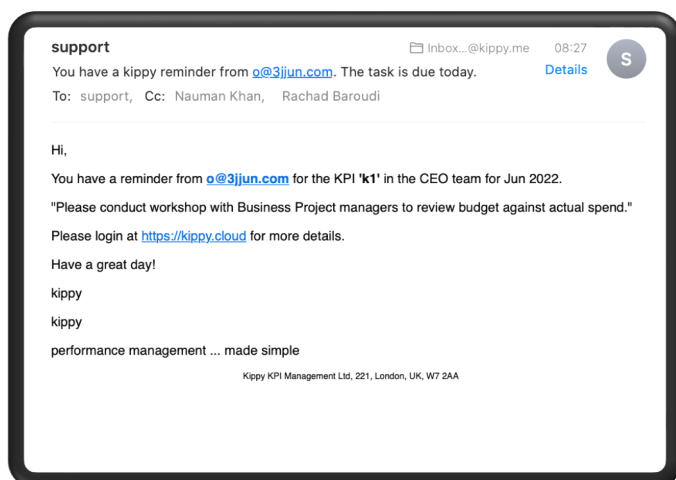
Click here to [unsubscribe](#) from these emails.

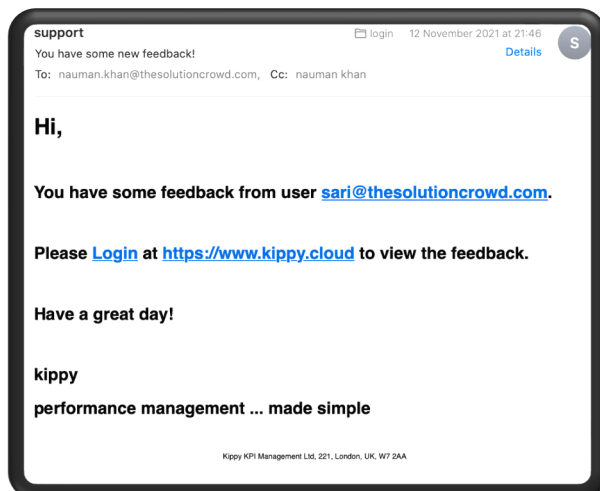
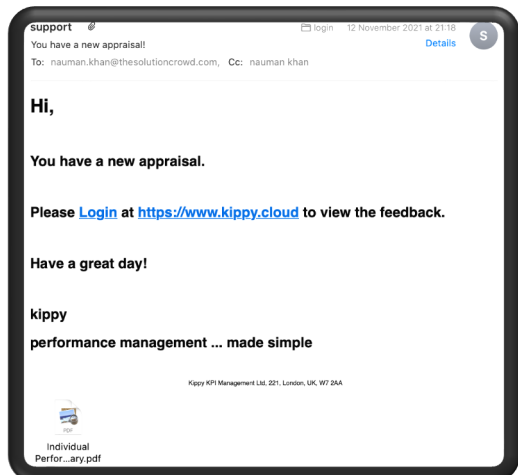
Kippy KPI Management Ltd, 221, London, UK, W7 2AA

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

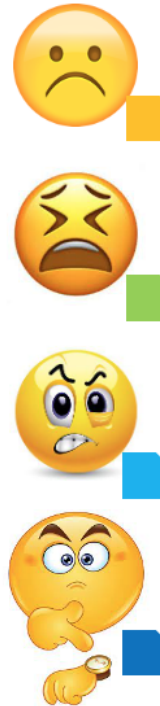
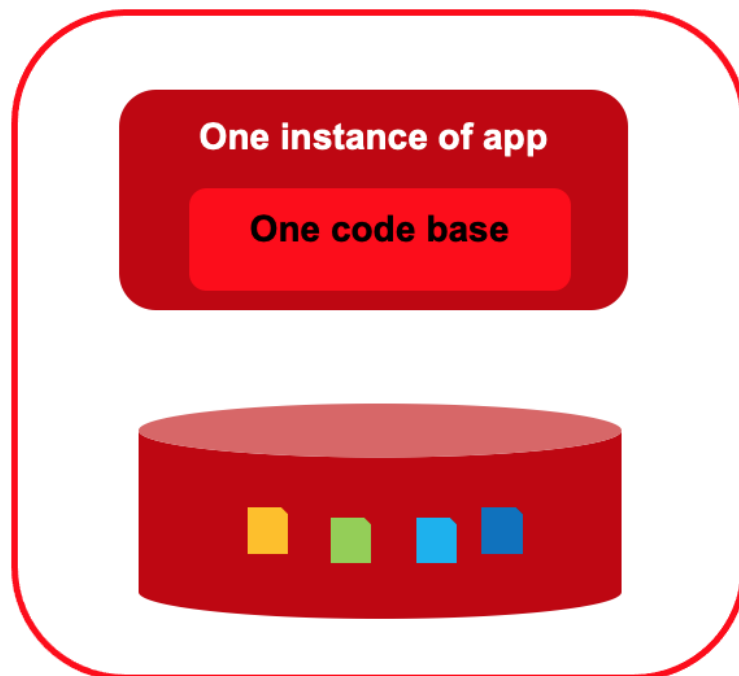
From a technical perspective, kippy is unique in that it does NOT provide a rigid Commercial off-the-shelf product.

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



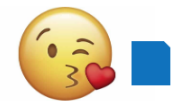
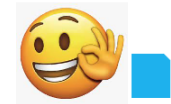
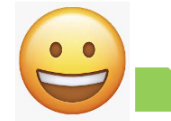
What does that mean for you? You have to put your requirements in a shared backlog for all your clients. You have to wait for the next major release. You have to do workarounds in your business processes to fit the constraints of their product.

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



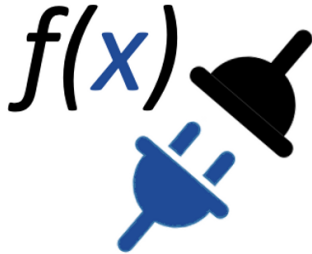
Web APIs

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

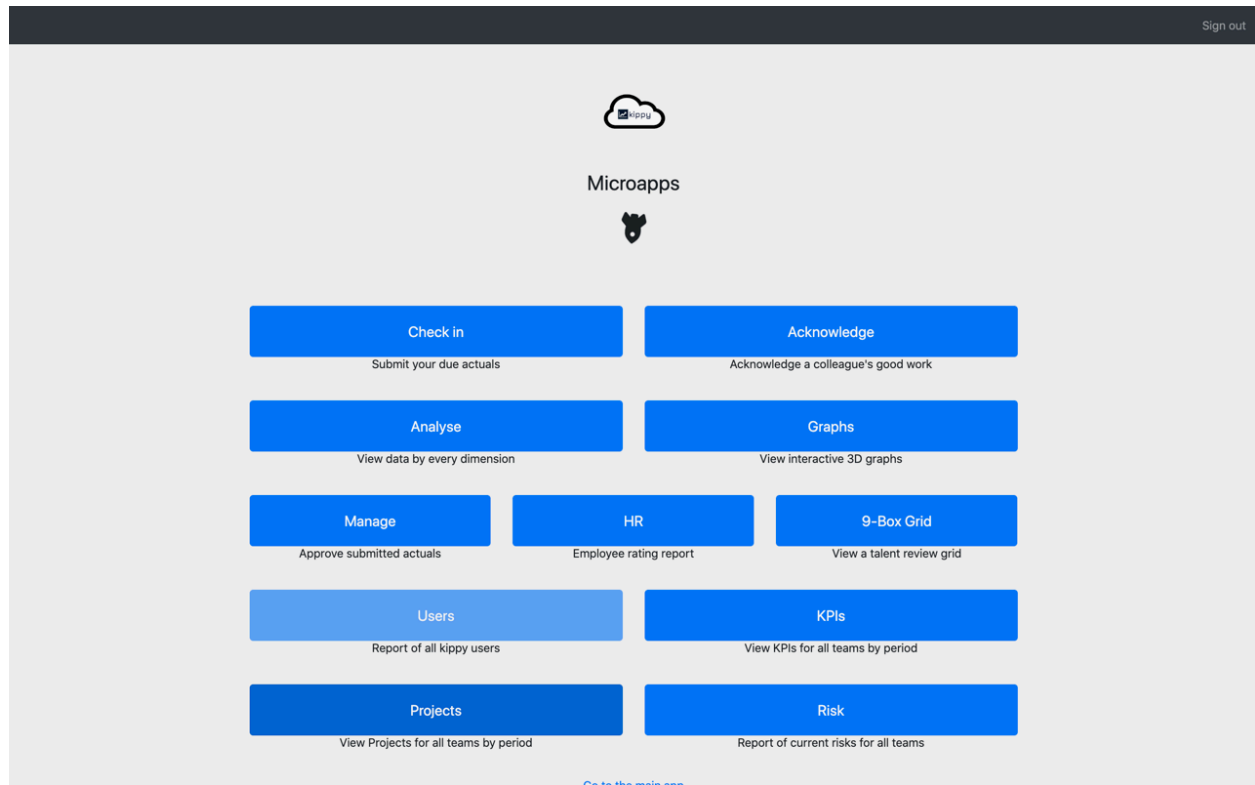


Pull and transform data without coding or support from IT. Dynamically set your actuals by referencing other KPIs with functions like add, subtract, multiply, divide, percentage and average.

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!

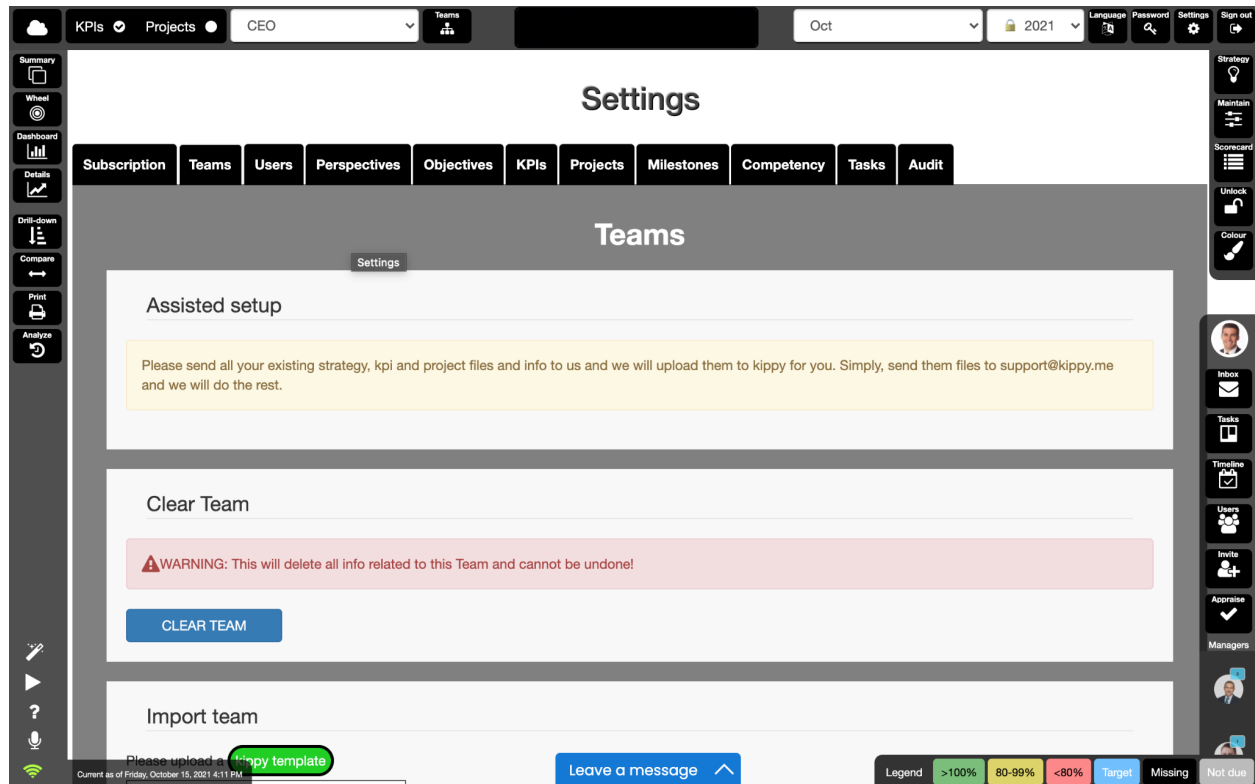
Your Kippy instance can be deployed to

- 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.

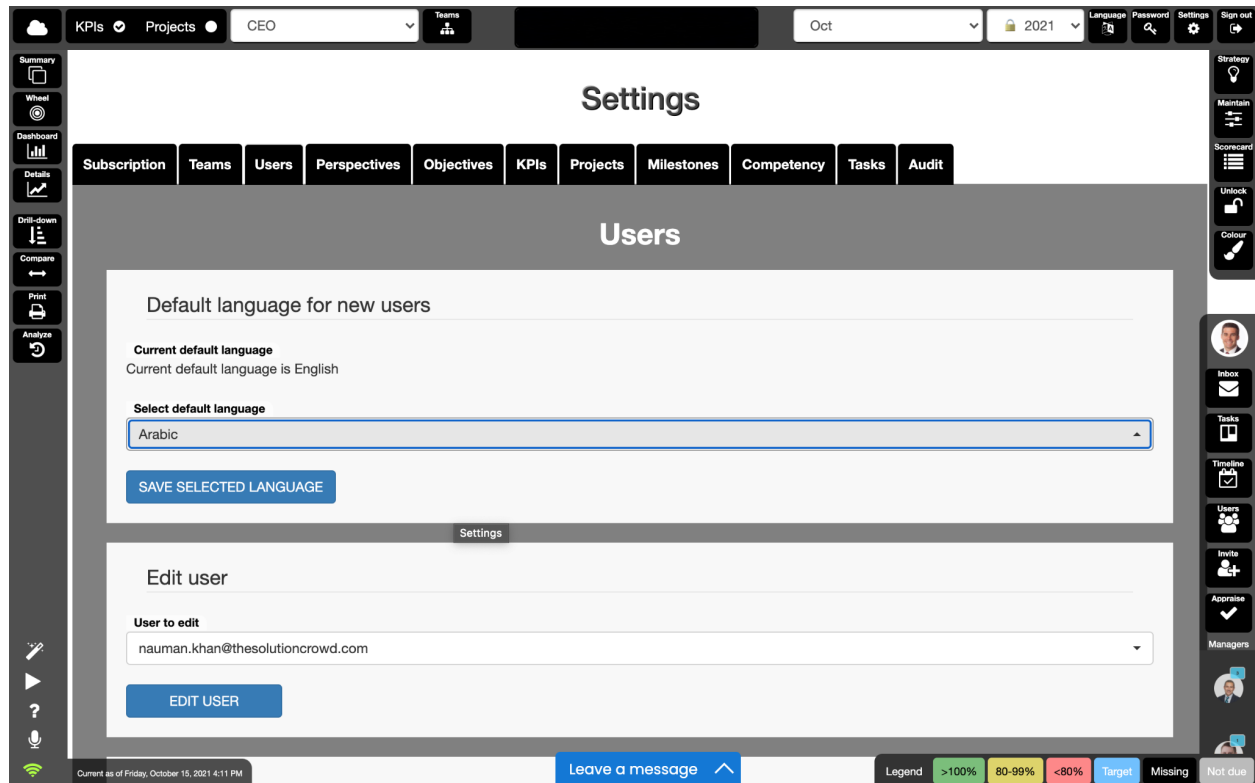


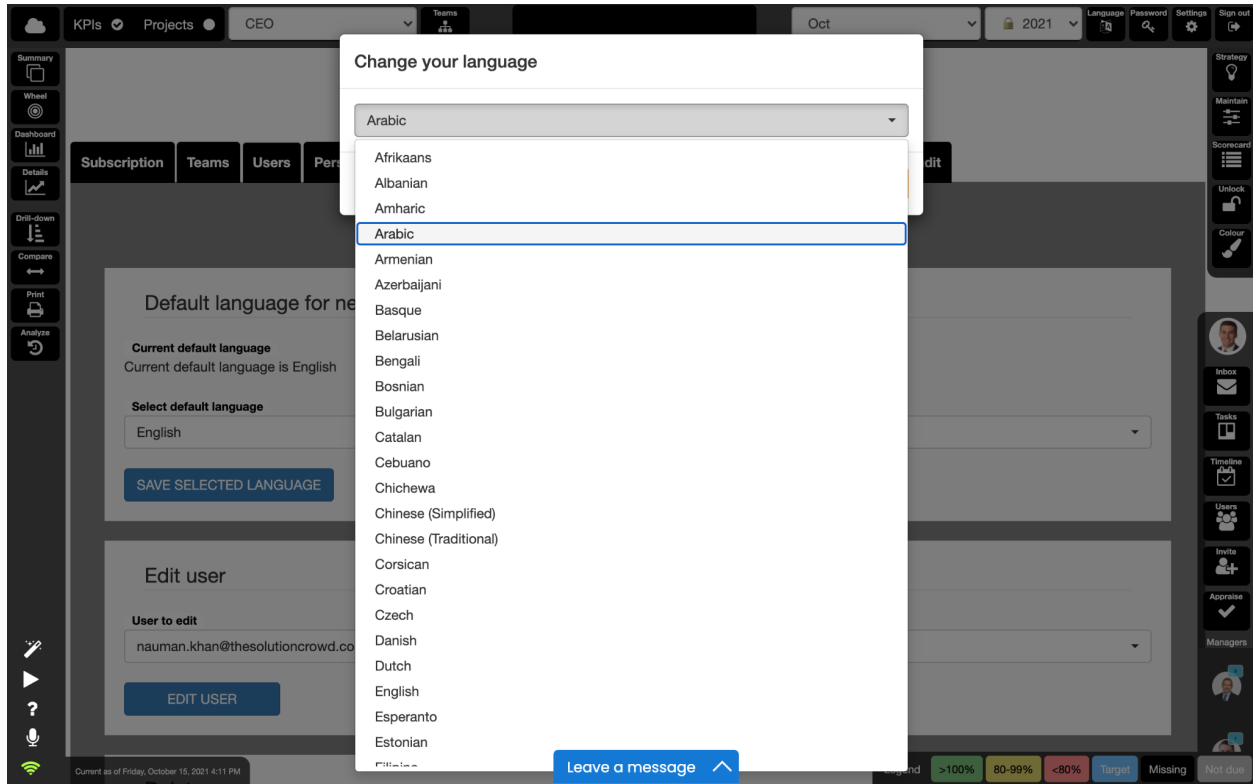
This includes

- 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'.

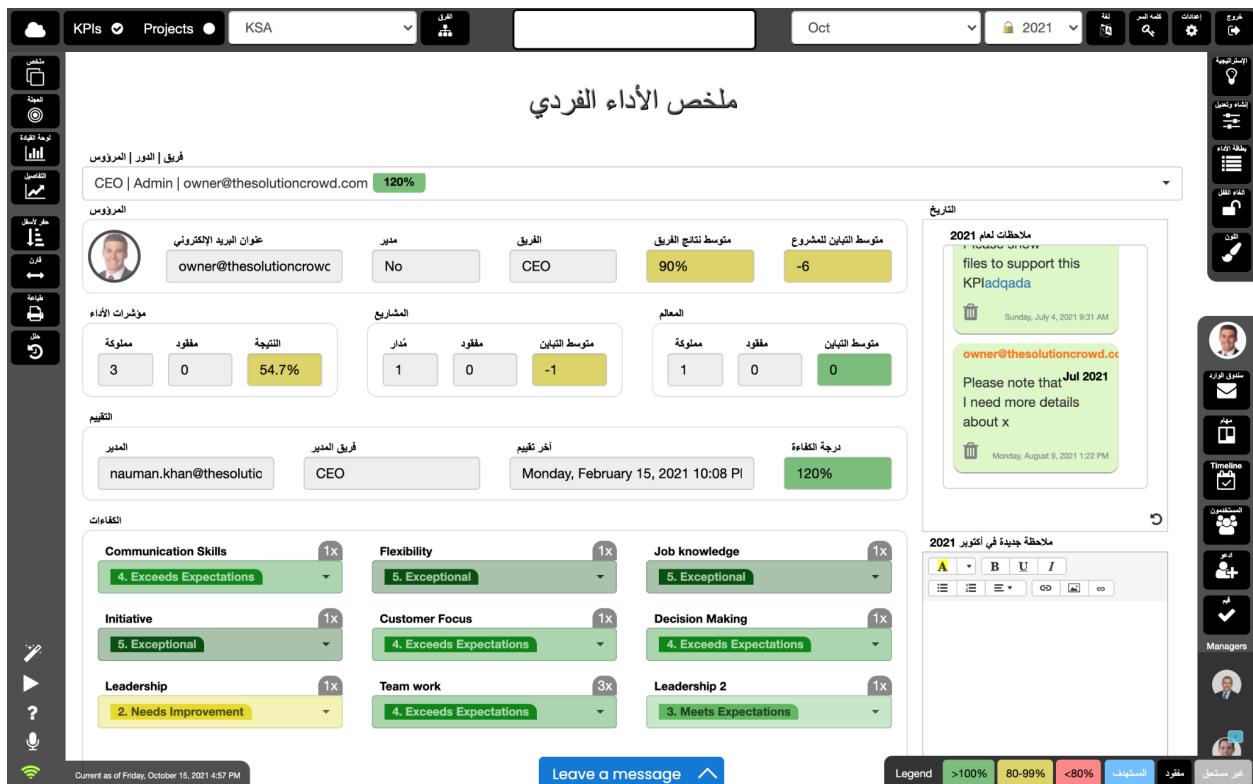
Multi-language

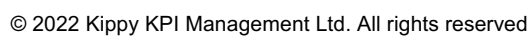
Kippy is available in over 100+ languages, including English and Arabic. The language can be defaulted to the whole organisation. Plus, each user can flip between languages as needed.





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



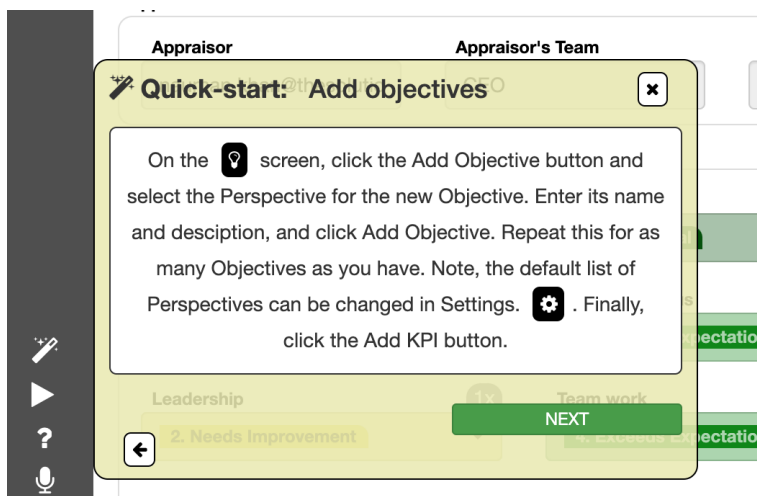


Help

All labels come with helpful help text on mouse hover.



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







Leave a message

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

Name

Email

or sign in with:




Message






Send

Powered by mylivechat

Chat now





Nauman



Nauman

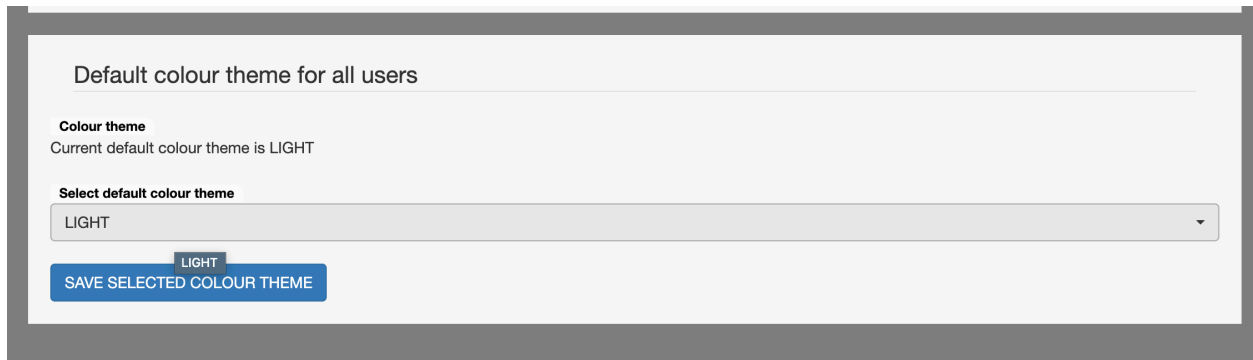
Hi, Please let me know if you have any questions or need any help getting set up. Thanks, Nauman

Type your message here...

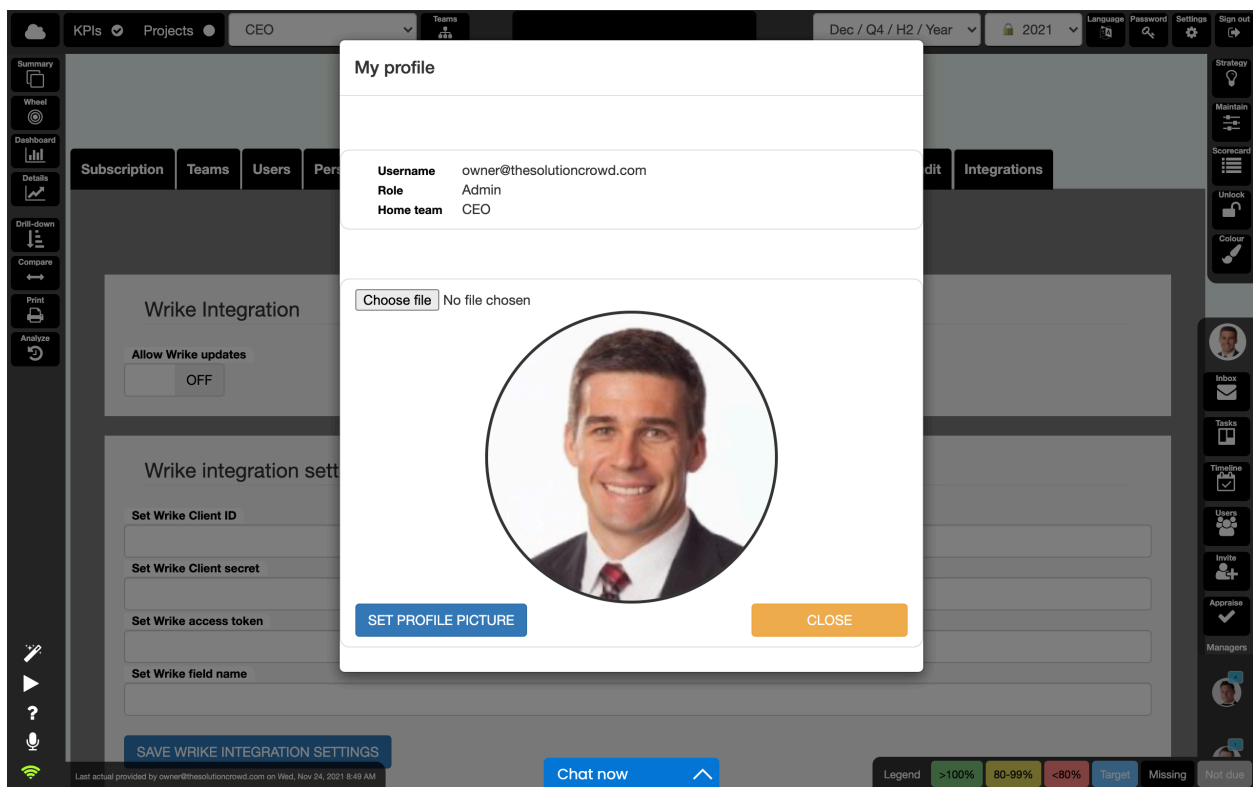


Personalisations

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



Set user profiles or let users self manage.






Mobile responsive


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

Navigation

Voice control

Change screens using your microphone.

 **Kippy - Voice Commands - Cheat Sheet**

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

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

Keyboard shortcuts

Shortcut to screens by pressing Shift and Function keys:

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

Tactile dashboards

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



Customisations

The system is integrated with OAuth2.0 identity mechanisms (including Google Login 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 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

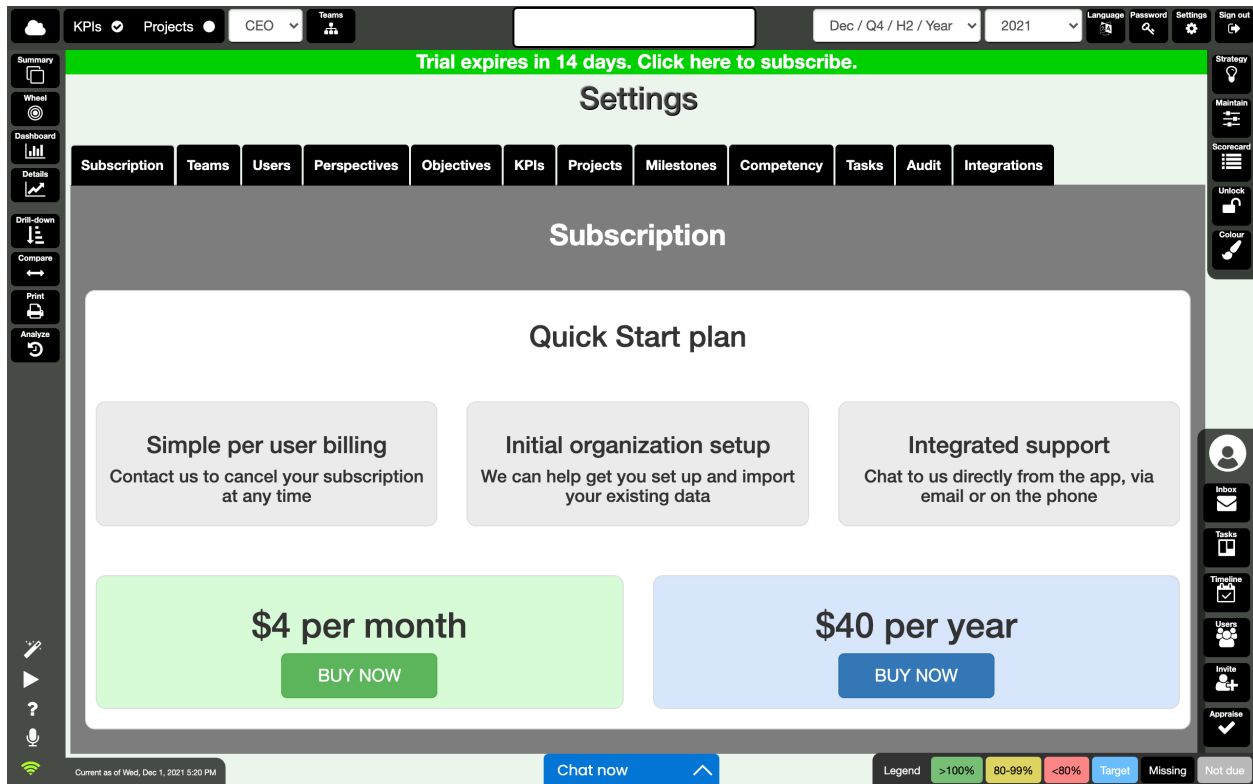
Several configurable integrations are already built-in, and can be enabled for our Enterprise customers. Please get in touch to learn more.

The screenshot displays the Kippy web application interface. At the top, a navigation bar includes 'KPIs', 'Projects', and a user dropdown for 'CEO'. The right side of the header shows filters for 'Dec / Q4 / H2 / Year' and '2021', along with search and settings icons. A left sidebar contains various tool icons like 'Summary', 'Wheel', 'Dashboard', 'Details', 'Drill-down', 'Compare', 'Print', and 'Analysis'. The main content area is titled 'Settings' and features a sub-header 'Integrations'. Below this, there's a 'Wrike Integration' section with a toggle for 'Allow Wrike updates' set to 'OFF'. The 'Wrike integration settings' section contains four input fields: 'Set Wrike Client ID', 'Set Wrike Client secret', 'Set Wrike access token', and 'Set Wrike field name'. A 'SAVE WRIKE INTEGRATION SETTINGS' button is positioned at the bottom of this section. The right sidebar lists navigation links: 'Strategy', 'Maintain', 'Scorecard', 'Unlink', 'Group', 'Inbox', 'Tasks', 'Entities', 'Users', 'Groups', 'Accounts', 'Managers', and 'Users'. The footer includes a status bar with a 'Chat now' button and a legend for performance metrics: '>100%', '80-99%', '<80%', 'Target', 'Missing', and 'Not due'.



Billing

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



Invoice based billing available for bulk and enterprise usage.



Security

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



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



Extensions

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

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

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

Contact us at info@kippy.cloud to learn more