



kippy

Feature Overview

3 Apr 2025

version 1.21



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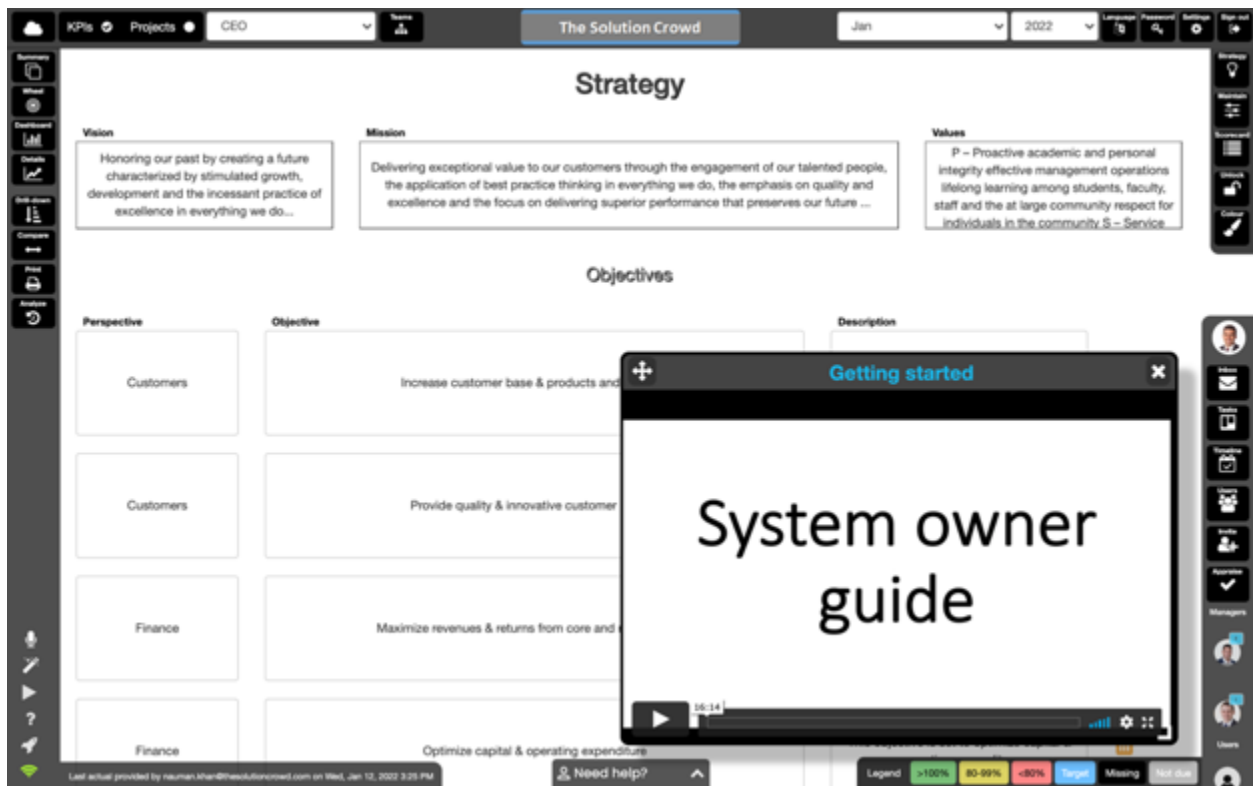
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Intro

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

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





Overview

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

☰

KPIs

Projects

CEO

The Solution Crowd

Dec / Q4 / H2 / Year

2024

📌 Home

👁 Overview

👤 Teams

🔍 Strategy

📊 Maintain

📈 Scorecard

📌 Check in

📄 Summary

🔍 Details

➤ Analyze

➤ Collaborate

➤ Manage

➤ Reports

➤ Tools

➤ Help

📶

Last updated by Owen Turner 18 minutes ago. Looks good to go.

Overview

Check ins (1)

1 check ins due from last month

1 day until lock

Team	KPI
CEO	Supplier Cost Savings

Inbox (36)

From	Message	Sent
Nauman Khan	pdf-sample_8.pdf	1 month ago
Owen Turner	Please provides info about JAK	3 months ago
Owen Turner	do this	3 months ago
Owen Turner	Not happy ... please provide details	4 months ago
Please provides more details		

Team overview (117%)

Perspective	Score
Finance	
Customers	96%
Internal Process	180.8%
People	104.6%
Objective	
Cost saving	

My overview

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

Tasks (17)

Due	Status	Description
	Not started	please send file
06-Sep-2023	In progress	
16-Sep-2023	At risk	Please do this urgently
13-Oct-2023	At risk	Please check
08-Nov-2023	In progress	IPV
16-Feb-2024	In progress	

Teams

Team	KPI Score
CEO	117%
Business Support	78%
Information Technology	80%
Operations	114%
Sales	85%

Need help?

Legend >=100% 70-99% <70% Target Missing Not due

Managers

Users



The overview is personalized by role so managers see more information.

Kippy Overview Dashboard

Navigation: Home | Analyze | Collaborate | Manage | Reports | Tools | Help

User: CEO | **Organization:** The Solution Crowd | **Period:** Mar / Q1 | **Year:** 2025

Check ins

No outstanding check ins

Inbox (20)

From	Message	Sent
Owen Turner	Please provide evidence file	5 days ago
Owen Turner	please find a file	6 days ago
Owen Turner	Please provide details on Mar	6 days ago

Tasks (1)

Due	Status	Description
25-Dec-2024	At risk	

My overview

Item	Value
User's KPI Period Score	90%
Competency Score	n/a
Live Weighted Average	101
Rating	A+ (Greatly exceeds expectations >100)
Last Appraised	

Team overview (90%)

Perspective	Score
Customers	
Finance	57.7%
People	126.6%
Internal Process	78.3%

Watch list

Team	KPI	Score
CEO	Number of governance training hours per employee	62%

Teams

Team	KPI Score
CEO	90%
Business Support	181%
Information Technology	92%
Operations	110%
Sales	187%

Appraisals

Name	Weighted average	Rating
Alex Sanchez		
Ian Field		
Mike Lattas		
Neeraj Eshad		
Tom Frost		

Reviews

Name	KPIs to review	Total KPIs
Emma Windsor	1	3



Strategy

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

The screenshot displays the Kippy Strategy dashboard for the CEO role. The dashboard is organized into several sections:

- Header:** Includes navigation tabs for KPIs, Projects, and a dropdown menu for the role (CEO). It also shows the current month (Oct) and year (2021).
- Strategy Section:** Contains three main boxes:
 - 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 Section:** A table with three columns: Perspective, Objective, and Description.

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
- Footer:** Includes 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 (light blue).

Teams



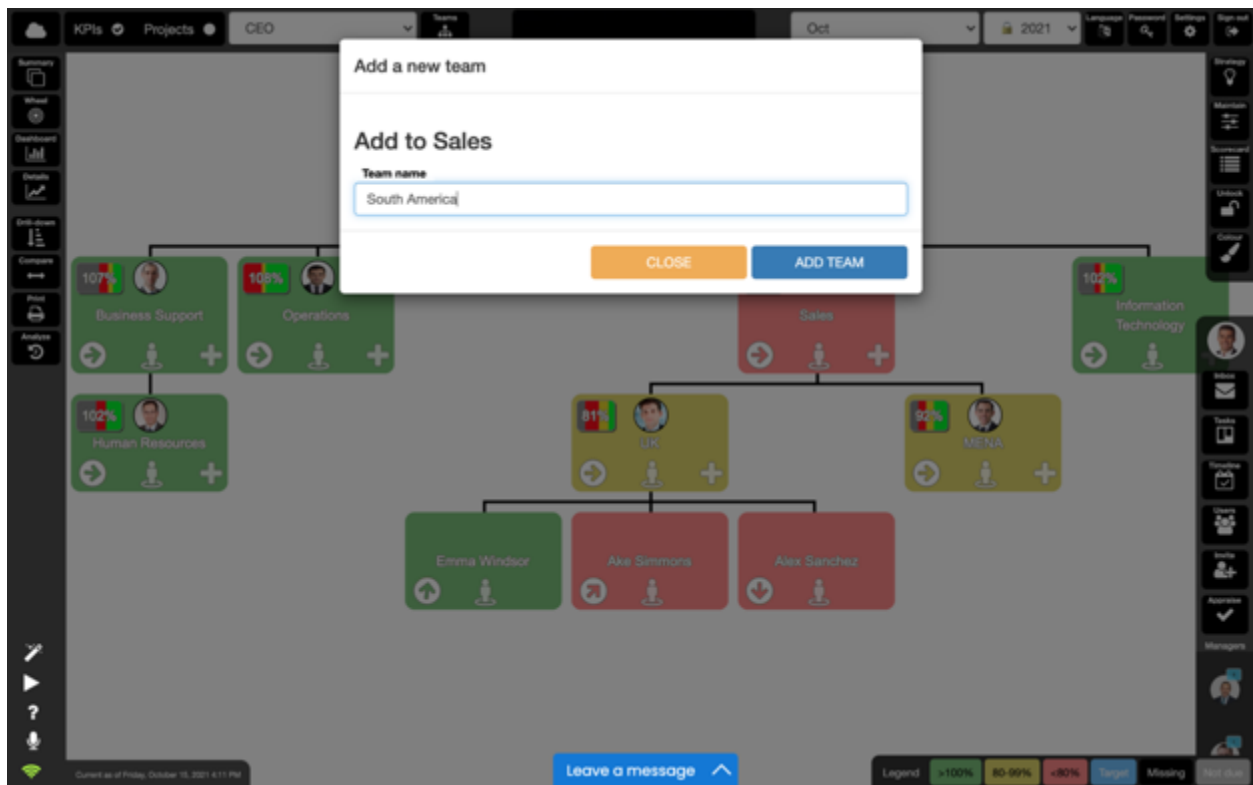
The team structure is created hierarchically by either the Admin adding sub-teams to a team or a Manager adding Employees to a team.

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

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



Add teams and people directly to the hierarchy.

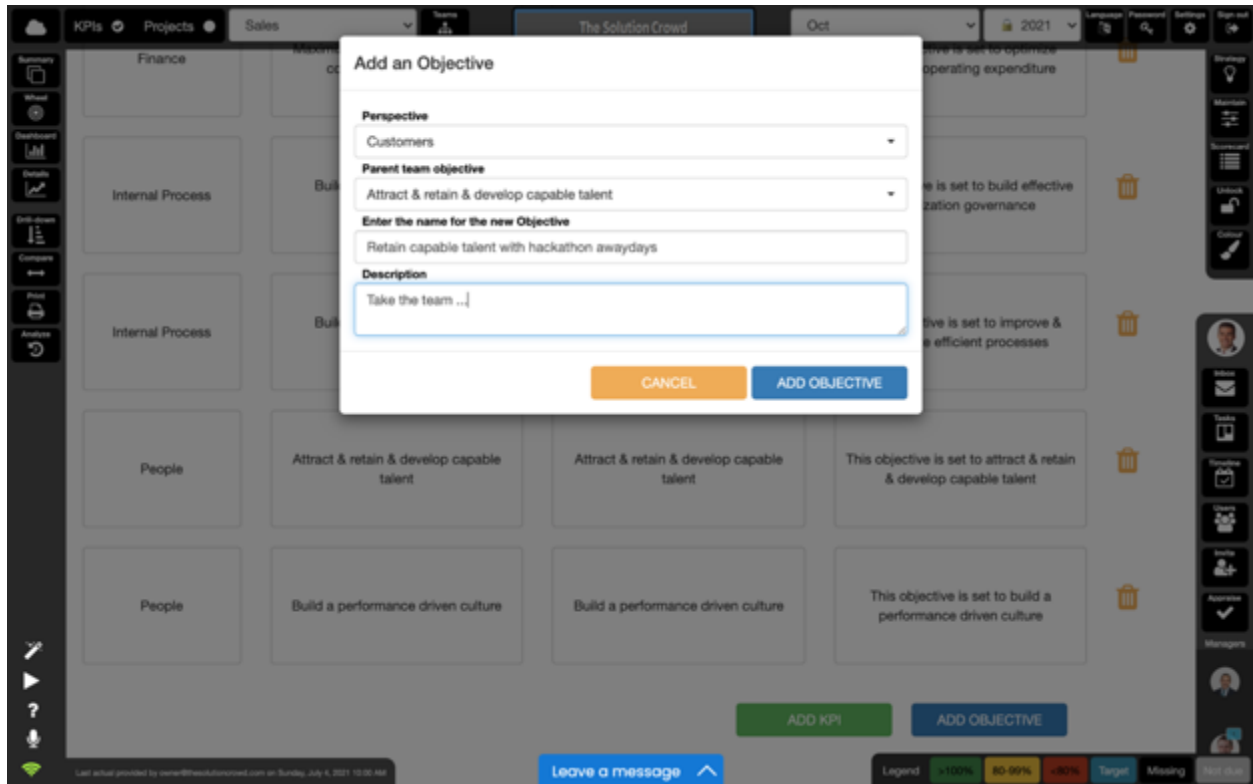




The screenshot displays the Kippy dashboard interface. At the top, there are navigation tabs for KPIs, Projects, Sales, and Teams. The 'Teams' tab is active, showing a hierarchical tree structure of teams. A modal window titled 'Add a new team member' is open, with a sub-header 'Add to UK'. The modal contains two input fields: 'User's name' with the value 'Bob Jones' and 'User's email' with the value 'bob.jones@thesolutioncrowd.com'. Below the input fields are two buttons: 'CLOSE' and 'ADD USER'. The background dashboard shows a team hierarchy. The 'UK' team is highlighted, showing three members: Emma Windsor (22%), Ake Simmons (50%), and Alex Sanchez (0%). Other teams visible include Business Support (100%), Operations (100%), Human Resources (100%), and Information Technology (100%). The bottom of the dashboard features a 'Leave a message' button and a legend for team status colors: green for >100%, yellow for 80-99%, red for <80%, blue for Team, and grey for Missing.

Objectives

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



Cascade objectives vertically down your organisation and create local objectives.

AI (Artificial Intelligence)

AI Suggested KPIs/KRs

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

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

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

Hints

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

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

Help

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

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

Edit and save in situ.

AI Suggested Strategy Templates

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



Edit team

CEO

Vision

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

Mission

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

Values

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

Other info

Award-winning UK based company.

SAVE

CANCEL

Quick Set

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

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

SAVE

CANCEL

ADD ROW

THINKING...



Kippy – Features

Quick Set

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

SAVE

CANCEL

ADD ROW

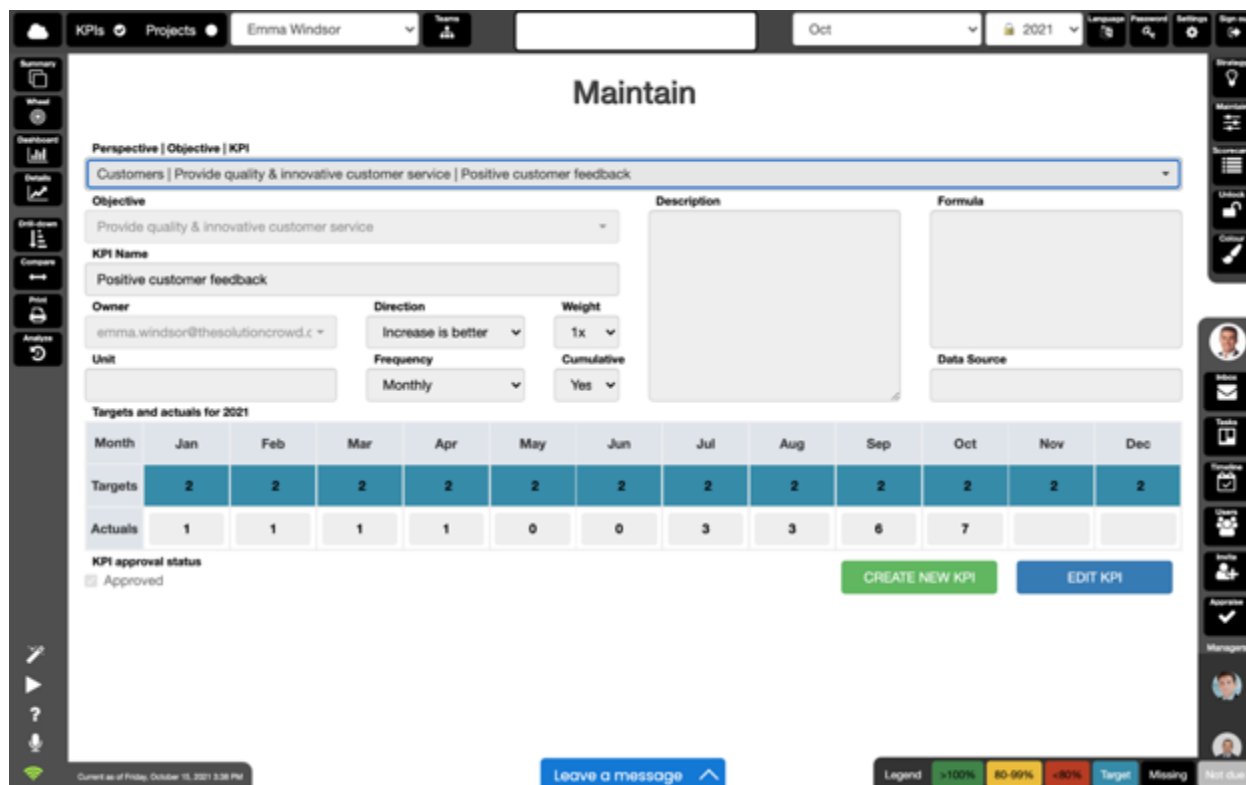
SUGGEST

Need help?

Tweak, approve and delegate for an instant strategy implementation.

KPIs

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



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.co.uk

Direction: Increase is better

Weight: 1x

Unit:

Frequency: Monthly

Cumulative: Yes

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](#)

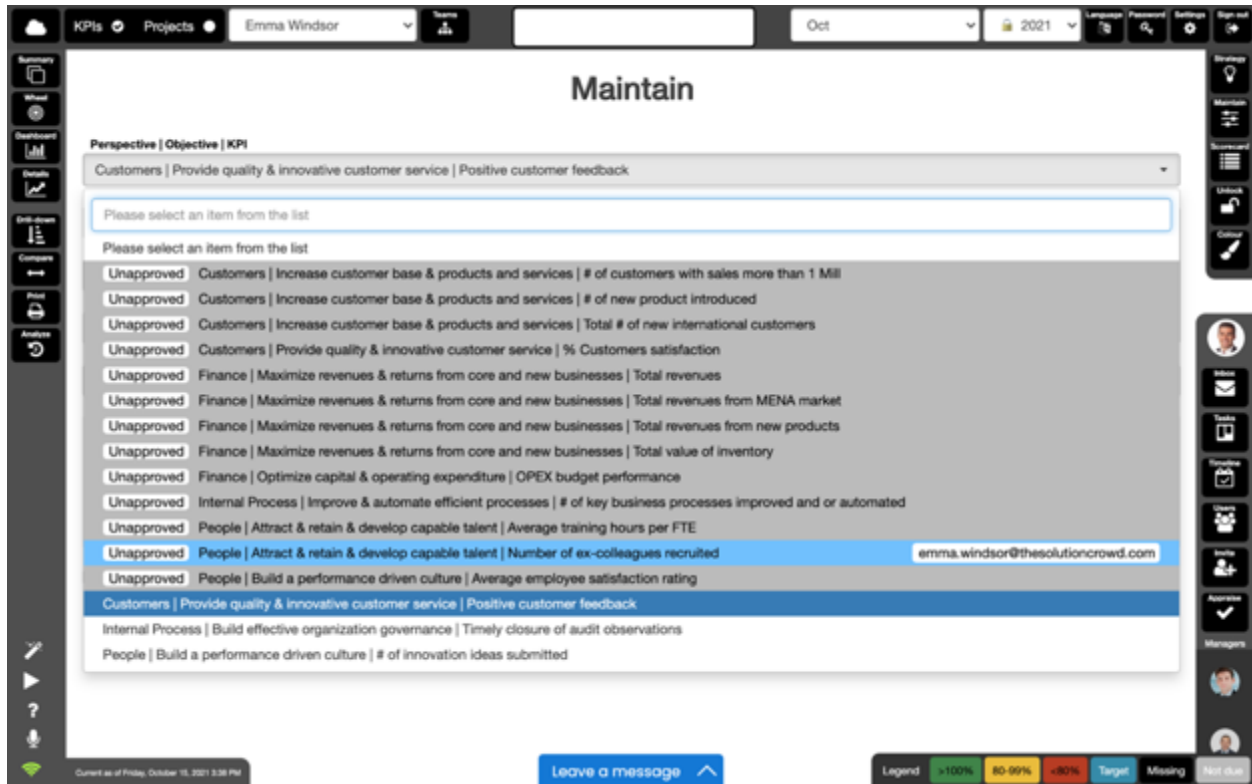
Current as of Friday, October 15, 2021 3:38 PM

[Leave a message](#)

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

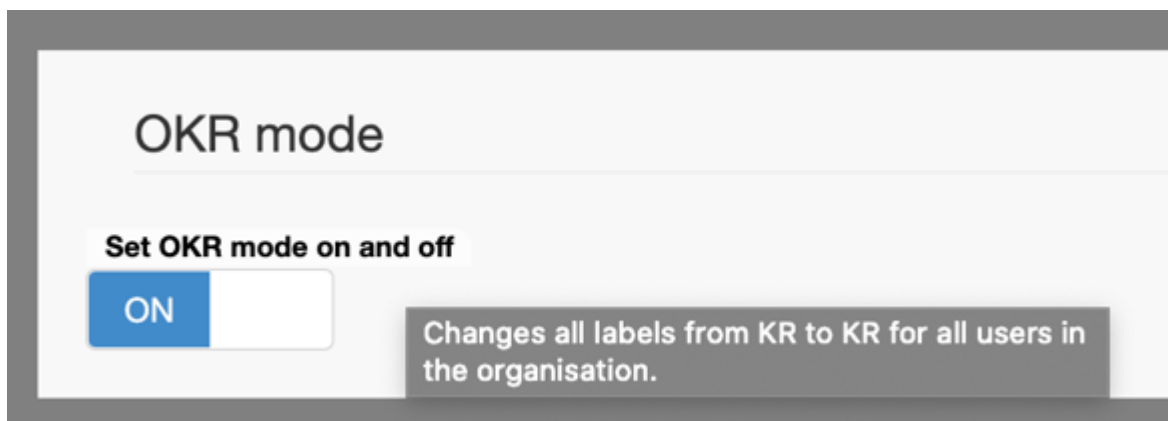
OKRs

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



The screenshot shows the 'Maintain' interface in Kippy. The top navigation bar includes 'KPIs', 'Projects', and a user dropdown for 'Emma Windsor'. The main content area is titled 'Maintain' and shows a list of KPIs under the 'Perspective | Objective | KPI' filter. The list includes various KPIs such as 'Increase customer base & products and services', 'Maximize revenues & returns from core and new businesses', and 'Attract & retain & develop capable talent'. A search bar is present at the top of the list. The bottom of the interface shows a 'Leave a message' button and a legend for KPI status: >100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (light blue).

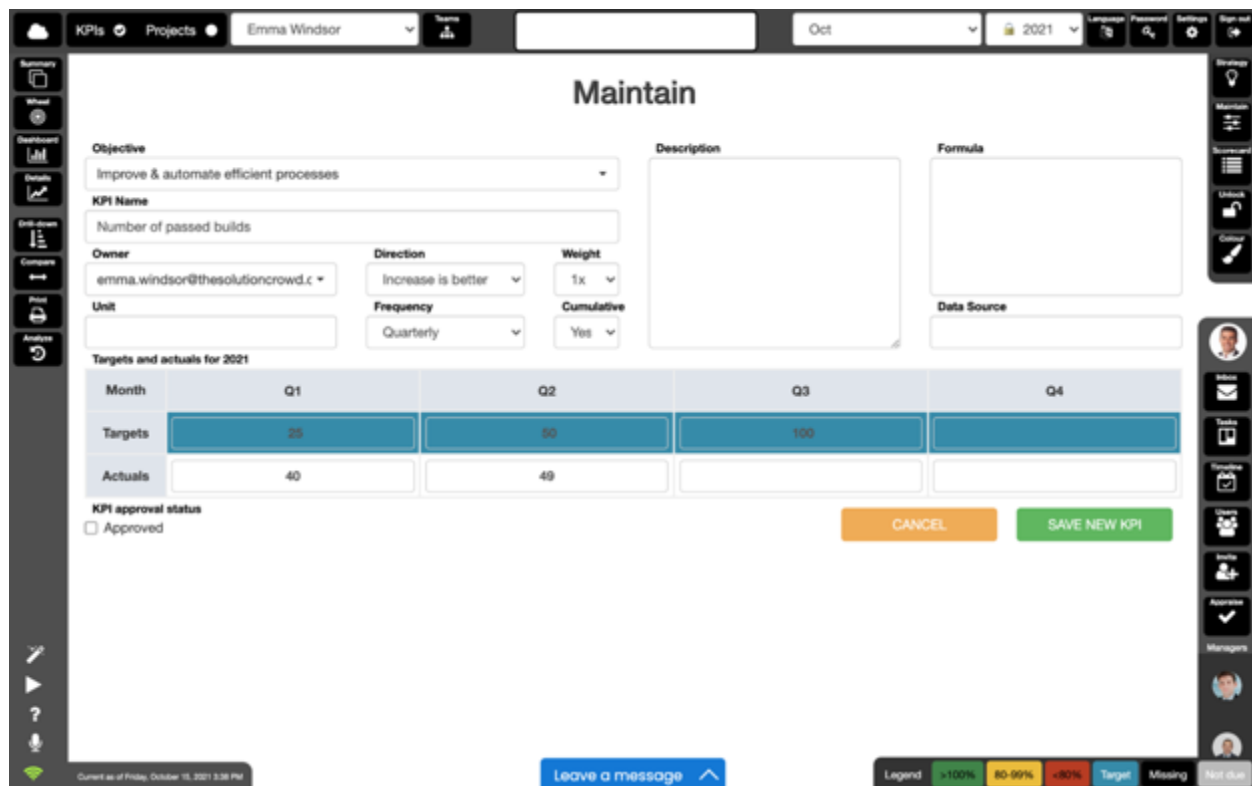
Full OKR mode



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

Targets

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



The screenshot shows the 'Maintain' interface in the Kippy application. The top navigation bar includes 'KPIs', 'Projects', and a user profile 'Emma Windsor'. The main form is titled 'Maintain' and contains the following fields:

- Objective:** A dropdown menu with the selected value 'Improve & automate efficient processes'.
- KPI Name:** A text input field containing 'Number of passed builds'.
- Owner:** A dropdown menu with the selected value 'emma.windsor@thesolutioncrowd.c'.
- Direction:** A dropdown menu with the selected value 'Increase is better'.
- Weight:** A dropdown menu with the selected value '1x'.
- Unit:** A text input field.
- Frequency:** A dropdown menu with the selected value 'Quarterly'.
- Cumulative:** A dropdown menu with the selected value 'Yes'.
- Description:** A large text area.
- Formula:** A large text area.
- Data Source:** A text input field.

Below the form, there is a table titled 'Targets and actuals for 2021'.

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

Below the table, there is a section for 'KPI approval status' with a checkbox labeled 'Approved'. At the bottom right, there are two buttons: 'CANCEL' (orange) and 'SAVE NEW KPI' (green).

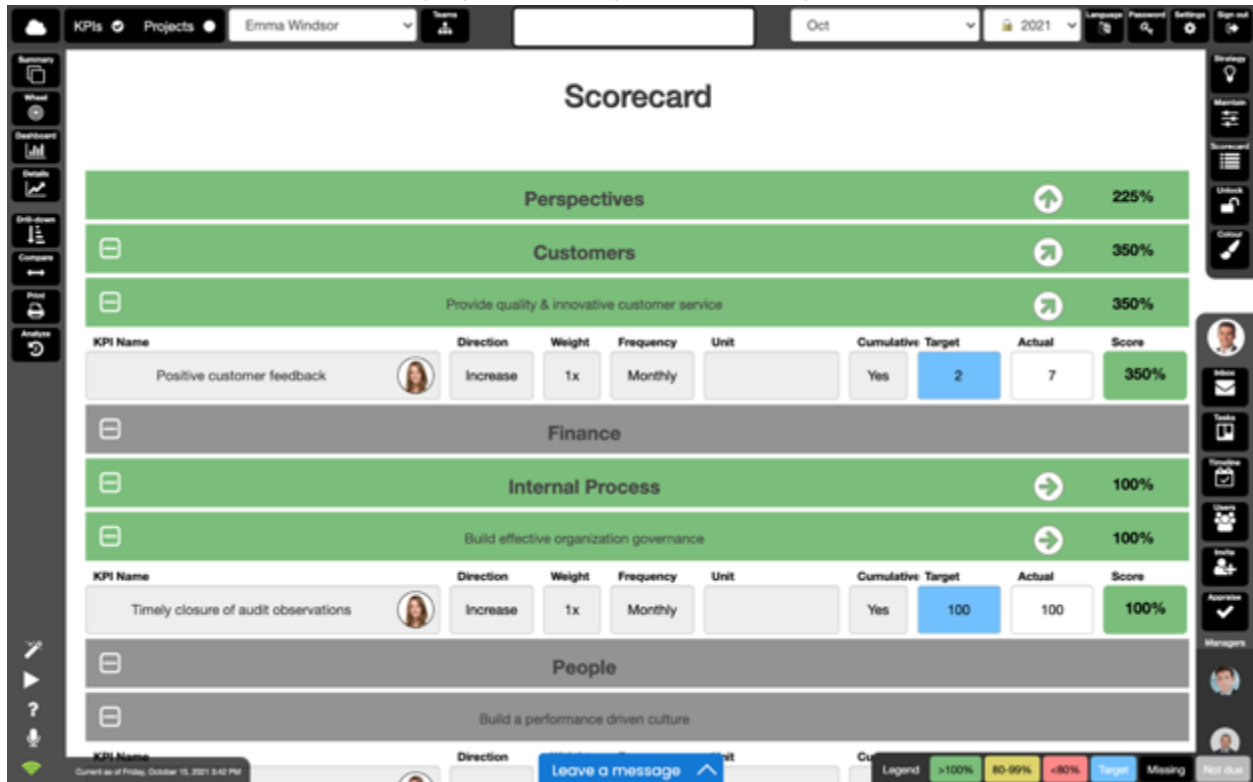
The bottom of the interface shows a status bar with the text 'Current as of Friday, October 15, 2021 3:28 PM', a 'Leave a message' button, and a legend for performance ranges: '>100%' (green), '80-99%' (yellow), '<80%' (red), 'Target' (blue), 'Missing' (grey), and 'Not due' (light blue).

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





Check-in microapp

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

The screenshot shows a standalone 'Check in' microapp interface. At the top center is the Kippy logo (a cloud with a checkmark and the word 'kippy'). Below the logo, the text 'Check in' is displayed in a large, bold font. Underneath, it says 'Please sign in'. There are two input fields: the first contains the email address 'emma.windsor@thesolutioncrowd.com', and the second is a password field filled with asterisks. Below these fields is a blue button with the text 'Sign in'. At the bottom center, there is a small copyright notice: '© 2021'.



Kippy

Sign out

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			

Kippy

Sign out

KPI details

Positive customer feedback (350%)

7 / 2

Emma Windsor

Customers

Provide quality & innovative customer service

Increase is better | 1x | Monthly | Cumulative

Submit new actual

Actual

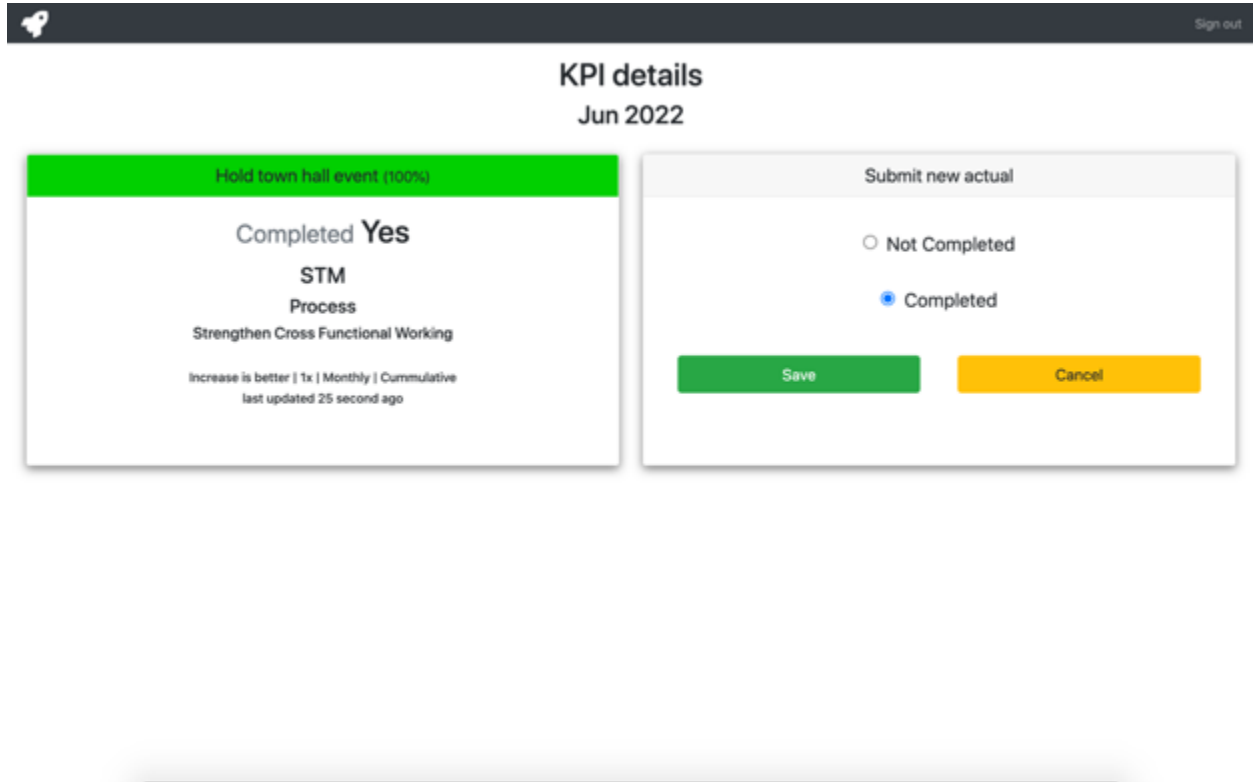
7

Save

Cancel

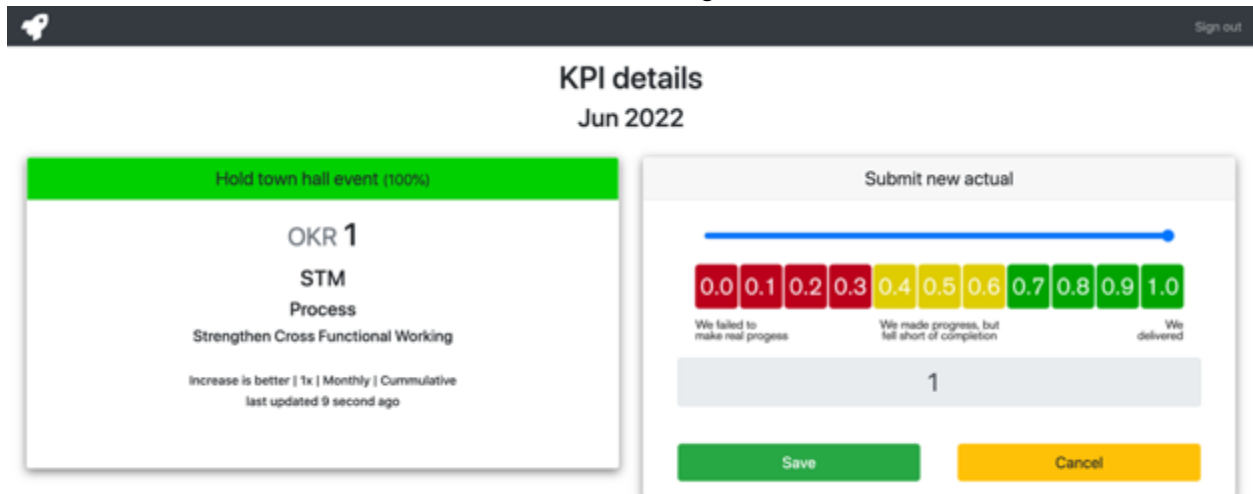
The check-in microapp will display different ‘widgets’ for input of the actual, based on the Unit of the KPI.

The KPI below has a Unit of Completed.



The screenshot shows the 'KPI details' for 'Jun 2022'. The KPI is 'Hold town hall event (100%)'. The status is 'Completed Yes'. The process is 'STM Process' with the description 'Strengthen Cross Functional Working'. The unit is 'Increase is better | 1x | Monthly | Cumulative' and it was 'last updated 25 second ago'. The 'Submit new actual' widget shows two radio buttons: 'Not Completed' and 'Completed' (selected). There are 'Save' and 'Cancel' buttons.

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



The screenshot shows the 'KPI details' for 'Jun 2022'. The KPI is 'Hold town hall event (100%)'. The status is 'OKR 1'. The process is 'STM Process' with the description 'Strengthen Cross Functional Working'. The unit is 'Increase is better | 1x | Monthly | Cumulative' and it was 'last updated 9 second ago'. The 'Submit new actual' widget shows a progress bar with a blue line and a blue dot. Below the bar are 11 colored boxes (0.0 to 1.0) with labels: 'We failed to make real progress' (0.0-0.3), 'We made progress, but fell short of completion' (0.4-0.6), and 'We delivered' (0.7-1.0). The value '1' is entered in the input field. There are 'Save' and 'Cancel' buttons.



Customer Churn Rate (100%)

RAG 10

CEO

Customers

Increase Customer Retention

Decrease is better | 1x | Monthly | Cumulative
(Number of customers lost during period / Total number of customers at start of period) * 100
last updated 3 minutes ago

Measures the percentage of customers lost over a specific period.

Submit new actual

☐ Red

☐ Amber

☒ Green

Save

Cancel

Customer Retention Rate (100%)

Achieved Yes

CEO

Customers

Increase Customer Retention

Increase is better | 1x | Monthly | Cumulative
((Number of customers at end of period - Number of new customers during period) / Number of customers at start of period) * 100
last updated 14 minutes ago

Tracks the percentage of customers retained over a specific period.

Submit new actual

Achieved?

☐ No

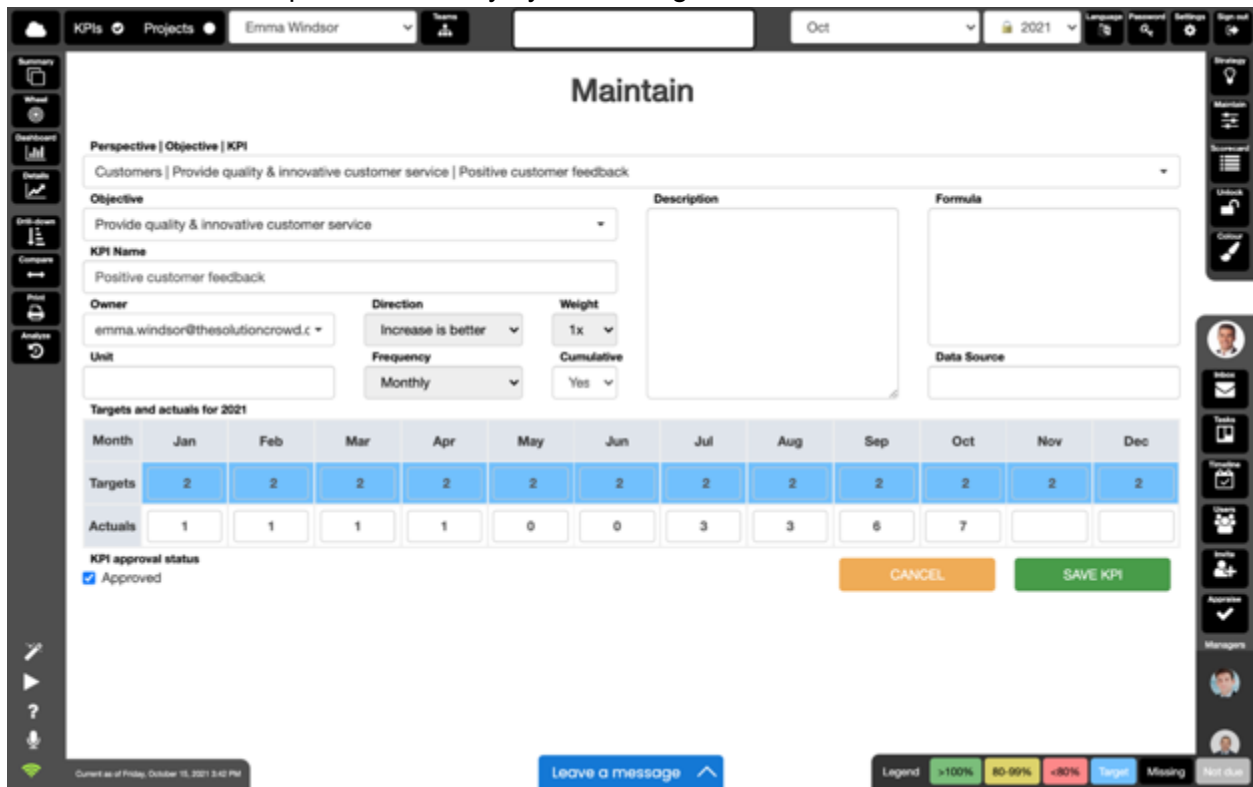
☒ Yes

Save

Cancel

Maintain UI

- Actual can be provided directly by the manager



Maintain

Perspective | Objective | KPI
Customers | Provide quality & innovative customer service | Positive customer feedback

Objective: Provide quality & innovative customer service

KPI Name: Positive customer feedback

Owner: emma.windsor@thesolutioncrowd.c

Direction: Increase is better

Weight: 1x

Unit:

Frequency: Monthly

Cumulative: Yes

Description:

Formula:

Data Source:

Targets and actuals for 2021

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

KPI approval status
☒ Approved

CANCEL SAVE KPI

Leave a message

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



Built-in adapters

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

Formula

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

Data Source

TFS



Web APIs

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

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

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

and pulled out again

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

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

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

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

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

Formulas

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

Formula

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

The in-built formulas include divide, multiply, add, subtract, percentage, min, max and average. These each take two parameters which are the names of KPIs in the current team. The result will be set as the KPI actual.

The use formula takes one parameters e.g. =cloud.kippy.use("Actual Test Effort") and will set the actual to the value of that KPI.

The abs formula takes no parameters (e.g. =cloud.kippy.abs()) and will set the actual to the positive value if a negative value is entered (e.g. -1 => 1, 0=>0, 1=>1)

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



Formula

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

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

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

You can also get the average and weighted average of children's scores and actuals.

KPI's on different teams can be referred to by prefixing the KPI name with the name of the Team and a fullstop e.g. `=cloud.kippy.percentage("Actual Test Effort","Sales.Planned Test Effort")`

Scores can also be manipulated with the following functions:

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




Formula

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

Formulas will turn red if they fail validation. More detail here: <https://www.kippy.cloud/formula>

Metrics

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

Sign out

Formula variables

(Aug 2023)

Current variables

Variable	Value
total items sold	850
units produced	900

Filter variables

Add new variables

Enter new variables

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

Add variables

Close

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

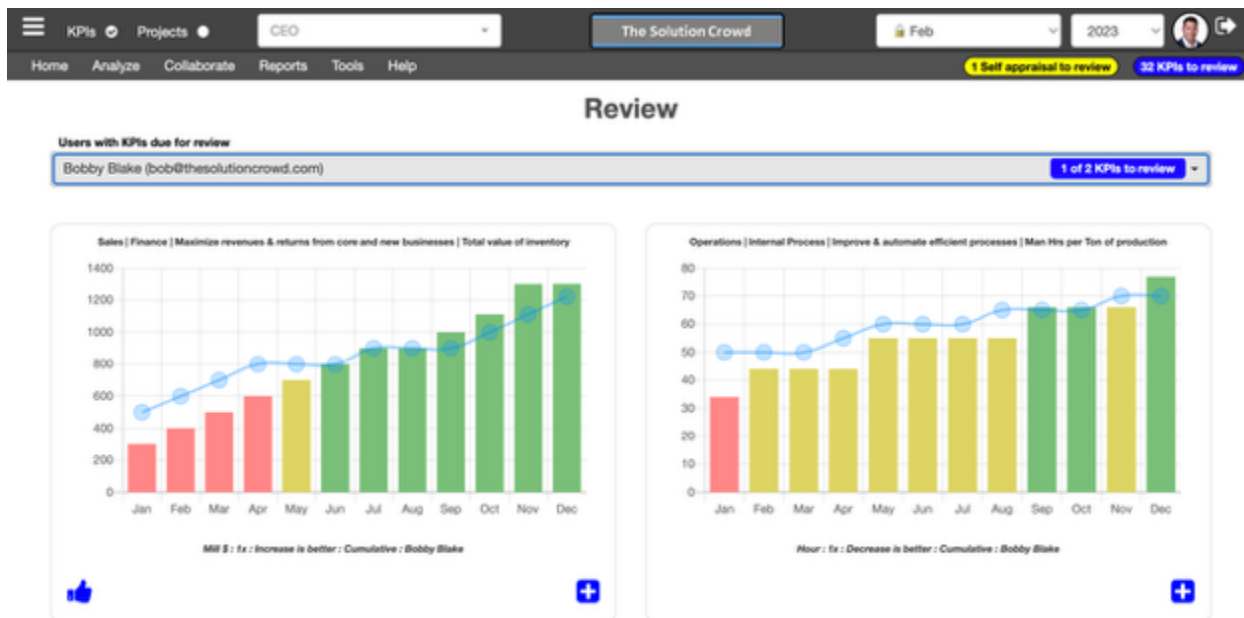


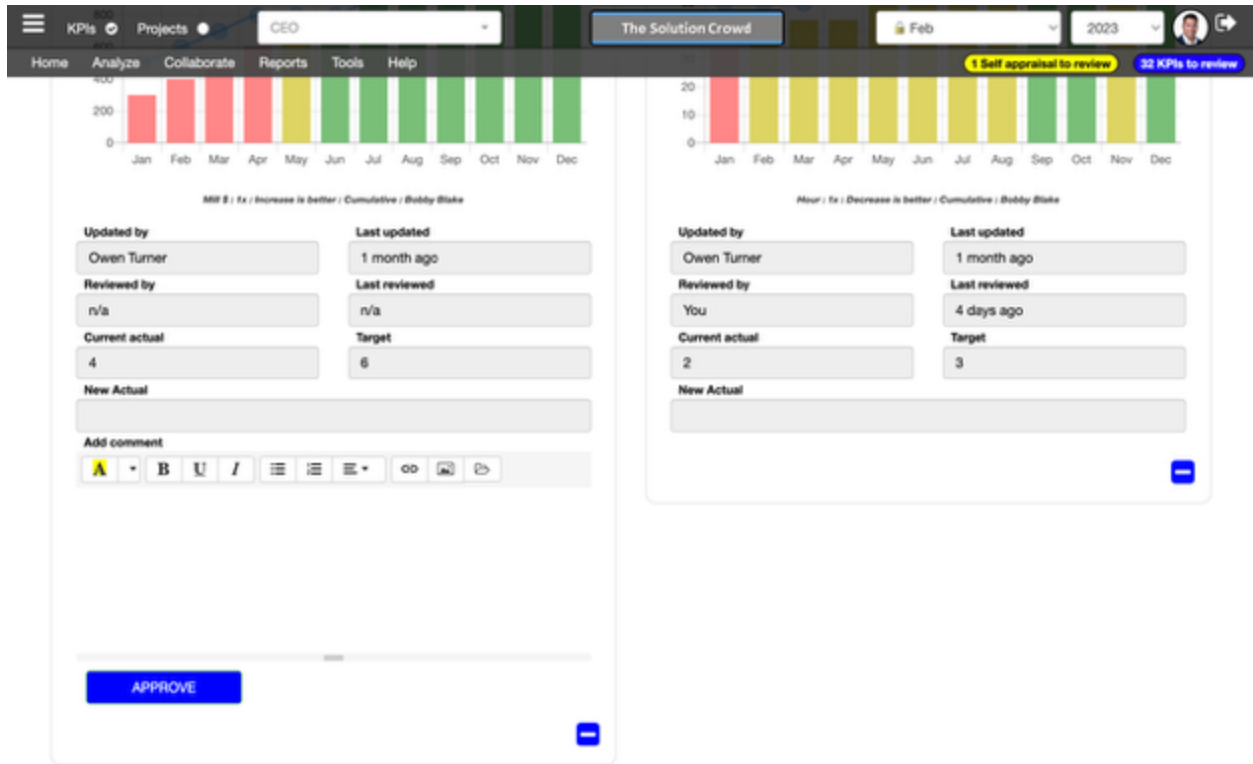
The formula e.g. `=cloud.kippy.use("param1")` will use the actual value of the *param1* – where *param1* is either the name of KPI in the current team or the name of a metric variable.

Reviewing actuals

Manager UI

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






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



Manager approval microapp

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



Manager

Please sign in

Sign in

© 2021

KippySign out

Individual KPIs

2021 > Oct

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

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



Employee KPI Review

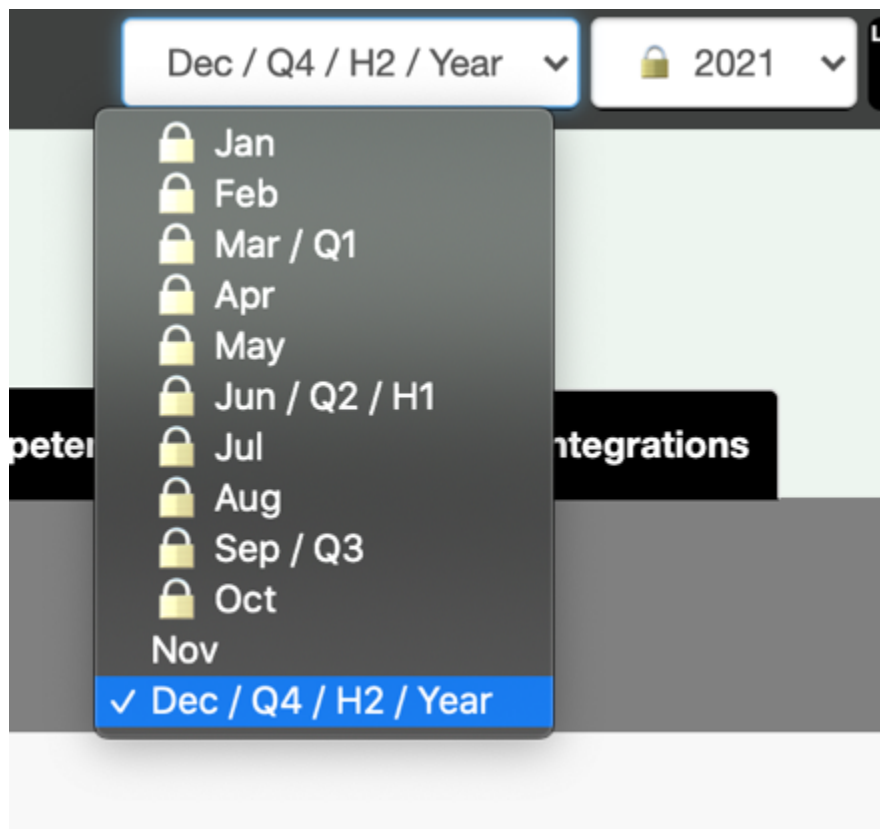
[2021](#) > [Oct](#) > Emma Windsor

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

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

History

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



Chat and wiki

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





Kippy – Features

Insert File

Select from files
Choose file | No file chosen

File URL

INSERT FILE

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

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

KPI Name
Awareness has spread

Owner
sari@thesolutioncrowd.com

Direction
Increase is better

Weight
1x

Frequency
Quarterly

Cumulative
Yes

Unit
10

Data Source

KPI Targets and Actuals table

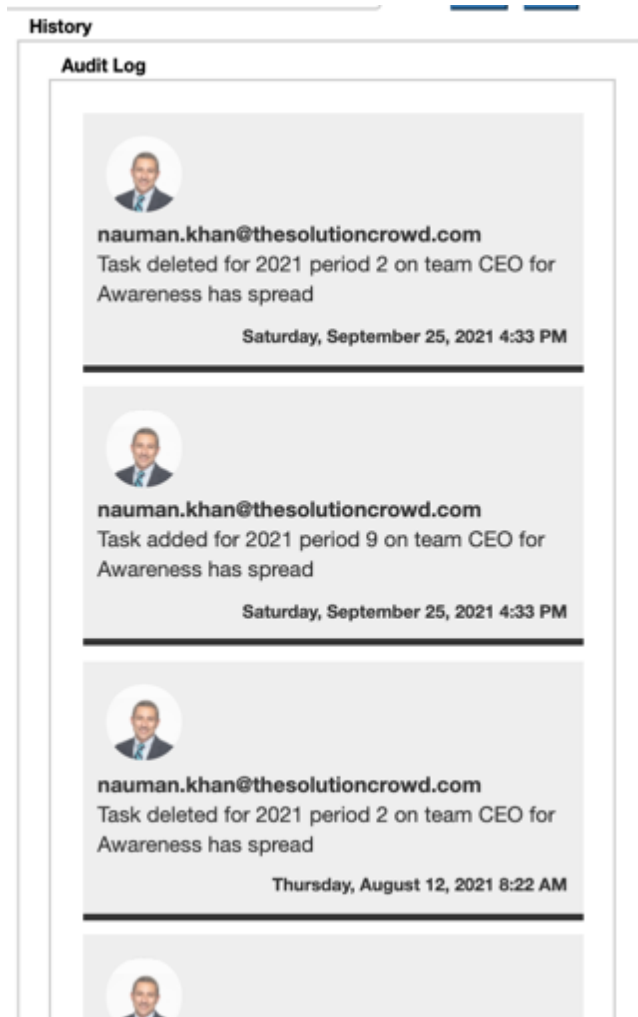
Month	Q1	Q2	Q3	Q4
Targets	500	700	800	950
Actuals	400	450	500	650
%	80	64	62	68

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

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

New note for Oct 2021
File attached

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



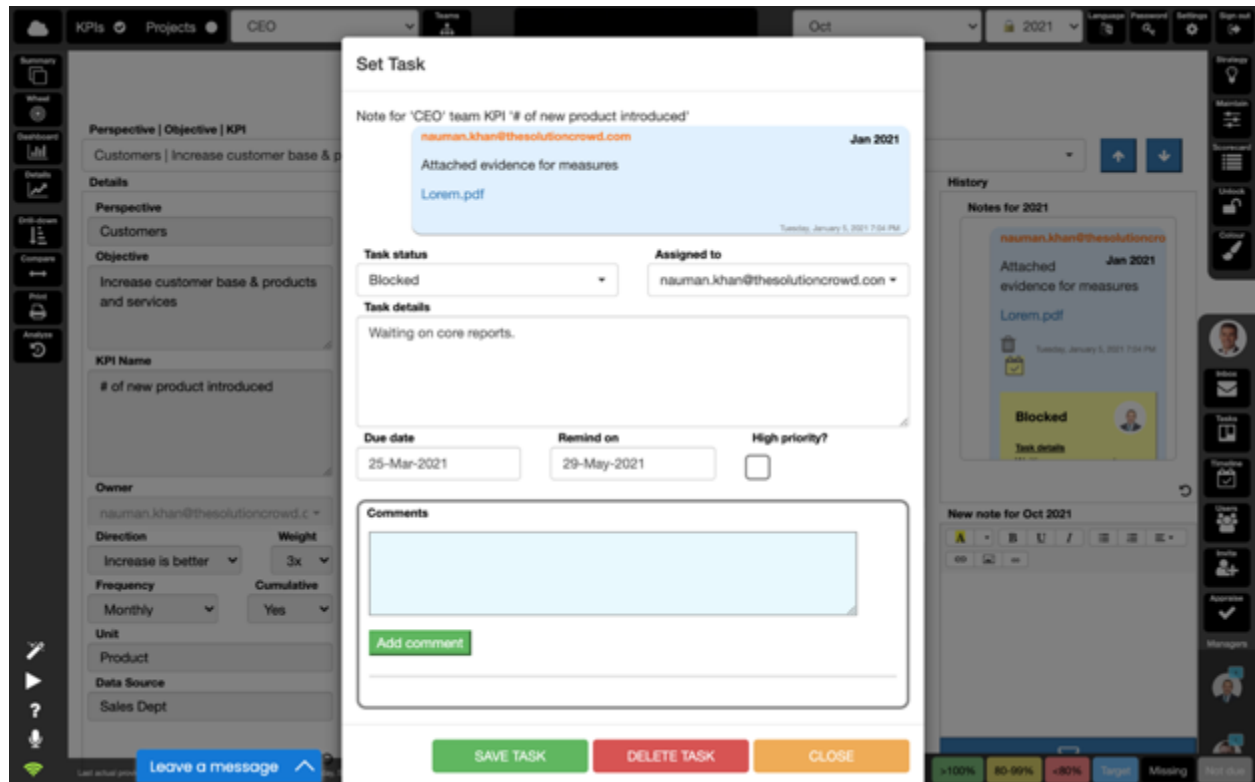
Mentions

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

Tasks

Task setting

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

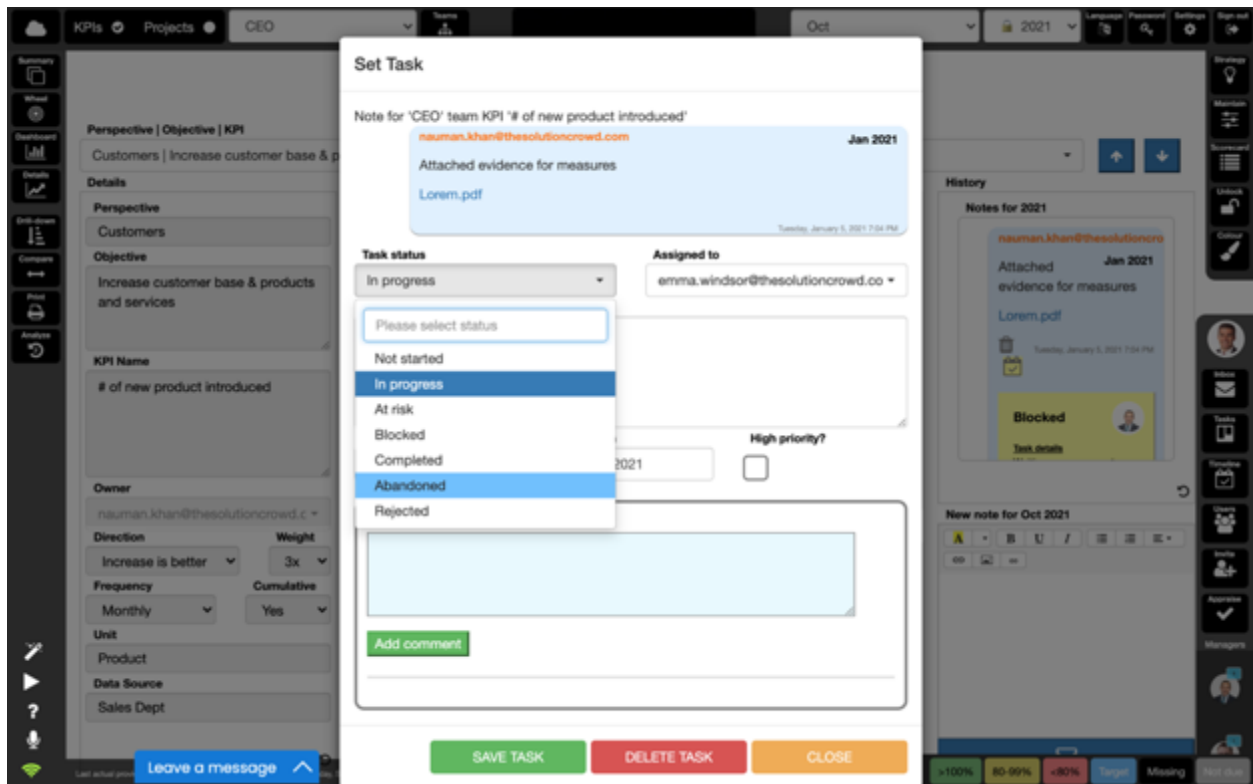


The screenshot shows the 'Set Task' modal form in the Kippy application. The form is titled 'Set Task' and contains the following fields and sections:

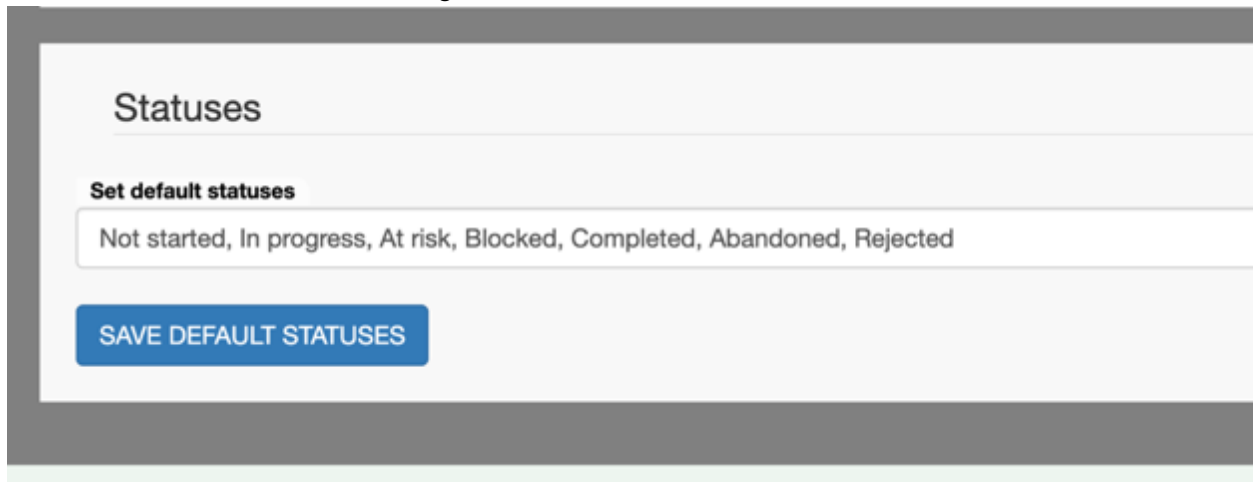
- Note for 'CEO' team KPI 'If of new product introduced'**: A text area with a date 'Jan 2021' and a timestamp 'Tuesday, January 5, 2021 7:04 PM'. It includes a link to 'nauman.khan@thesolutioncrowd.com' and an attachment 'Attached evidence for measures Lorem.pdf'.
- Task status**: A dropdown menu set to 'Blocked'.
- Assigned to**: A dropdown menu set to 'nauman.khan@thesolutioncrowd.com'.
- Task details**: A text area containing 'Waiting on core reports.'
- Due date**: A date field set to '25-Mar-2021'.
- Remind on**: A date field set to '29-May-2021'.
- High priority?**: A checkbox that is currently unchecked.
- Comments**: A large text area for additional comments, with an 'Add comment' button below it.

At the bottom of the modal, there are three buttons: 'SAVE TASK' (green), 'DELETE TASK' (red), and 'CLOSE' (orange). The background shows the Kippy interface with a sidebar on the left and a main content area on the right.

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

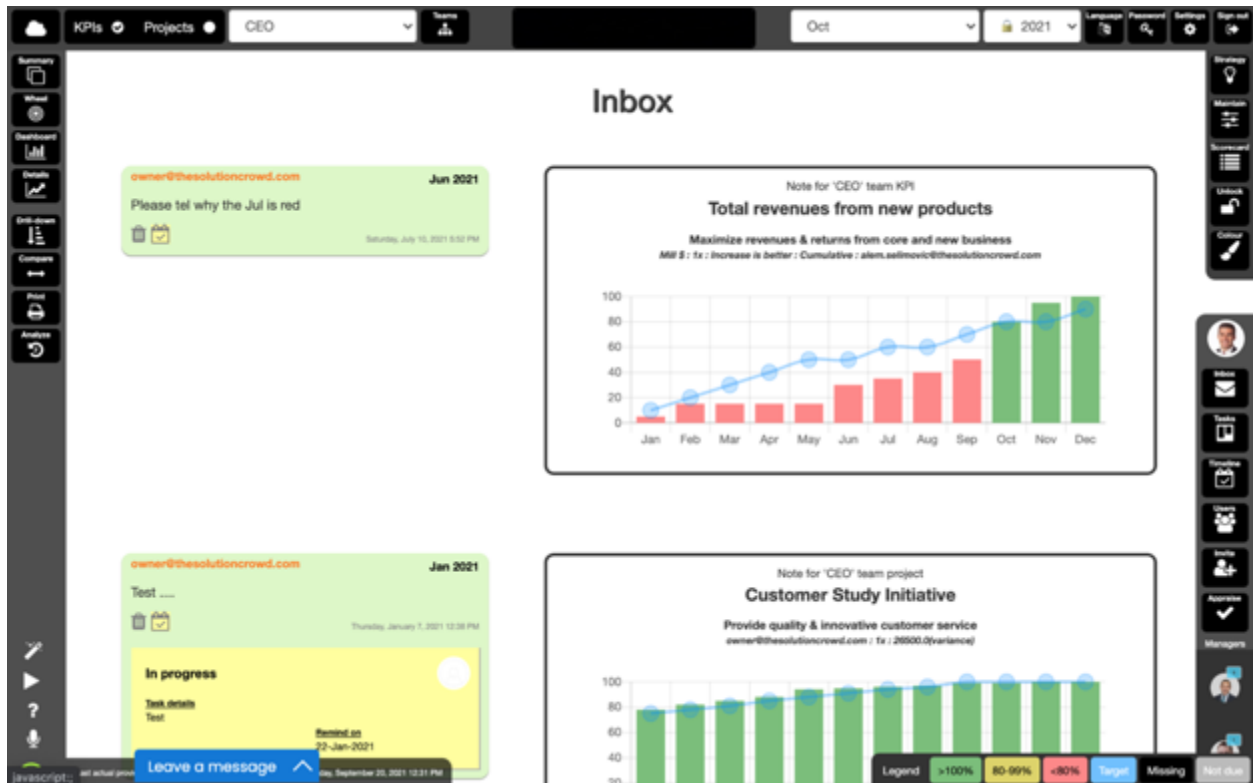


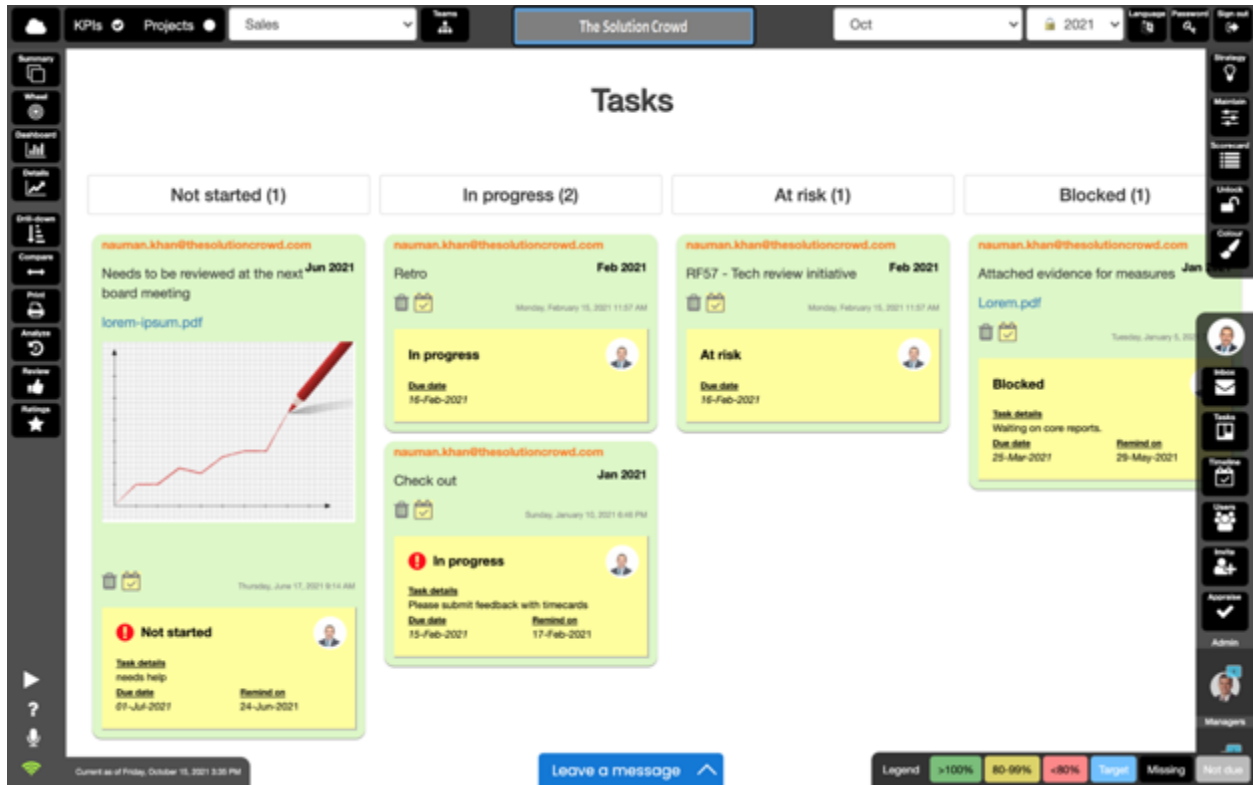
The set of task statuses are configurable.



Task viewing

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



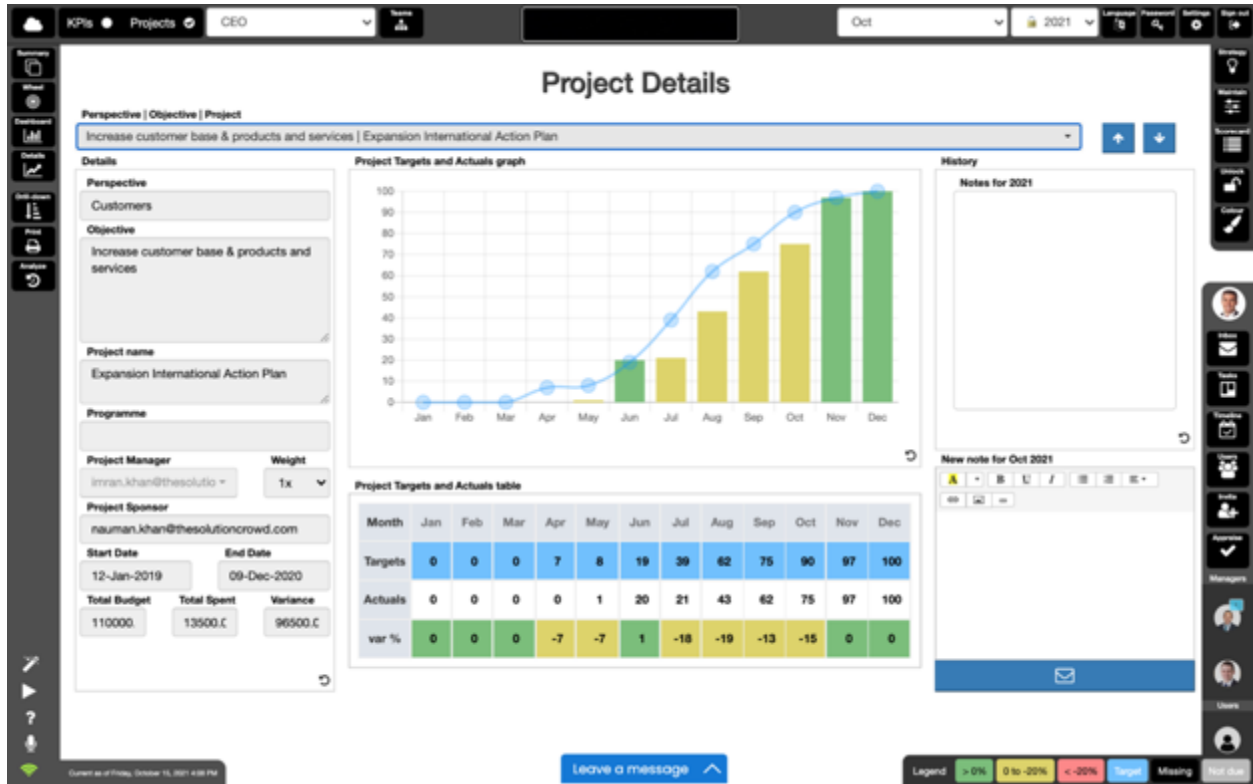


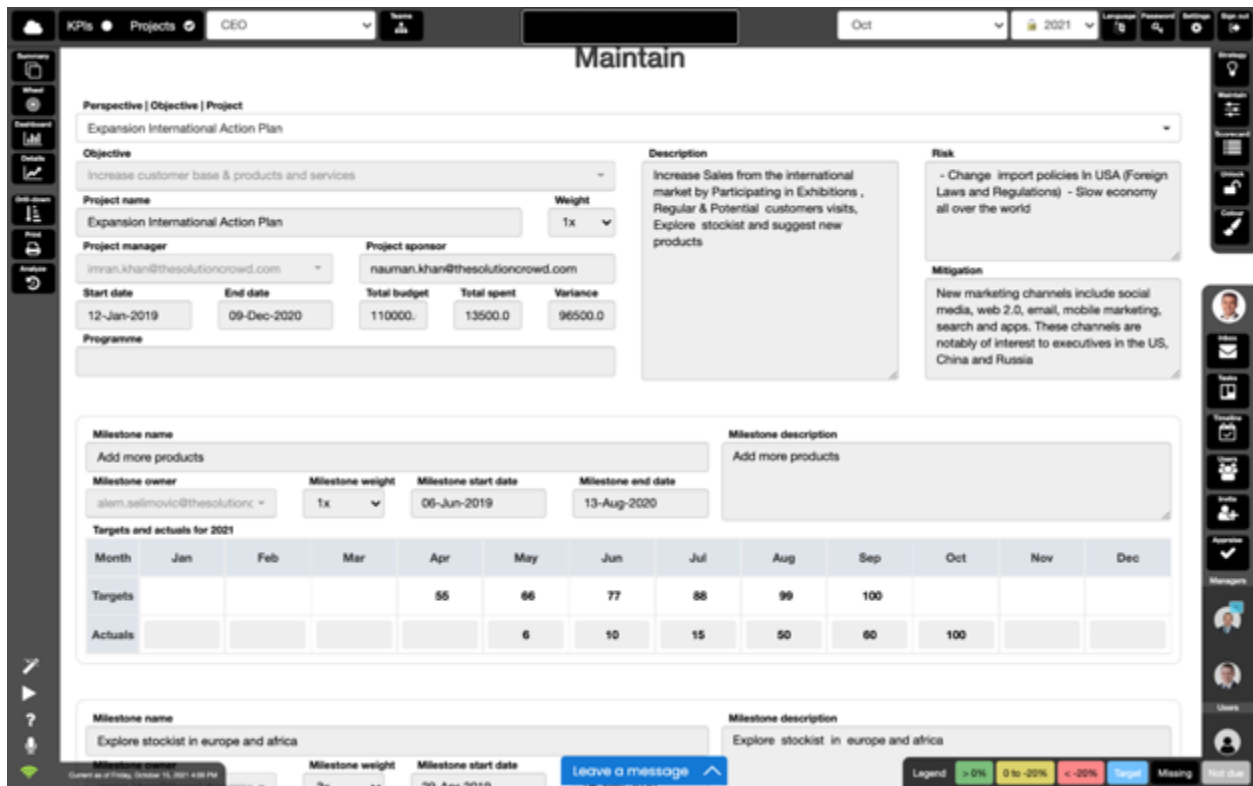
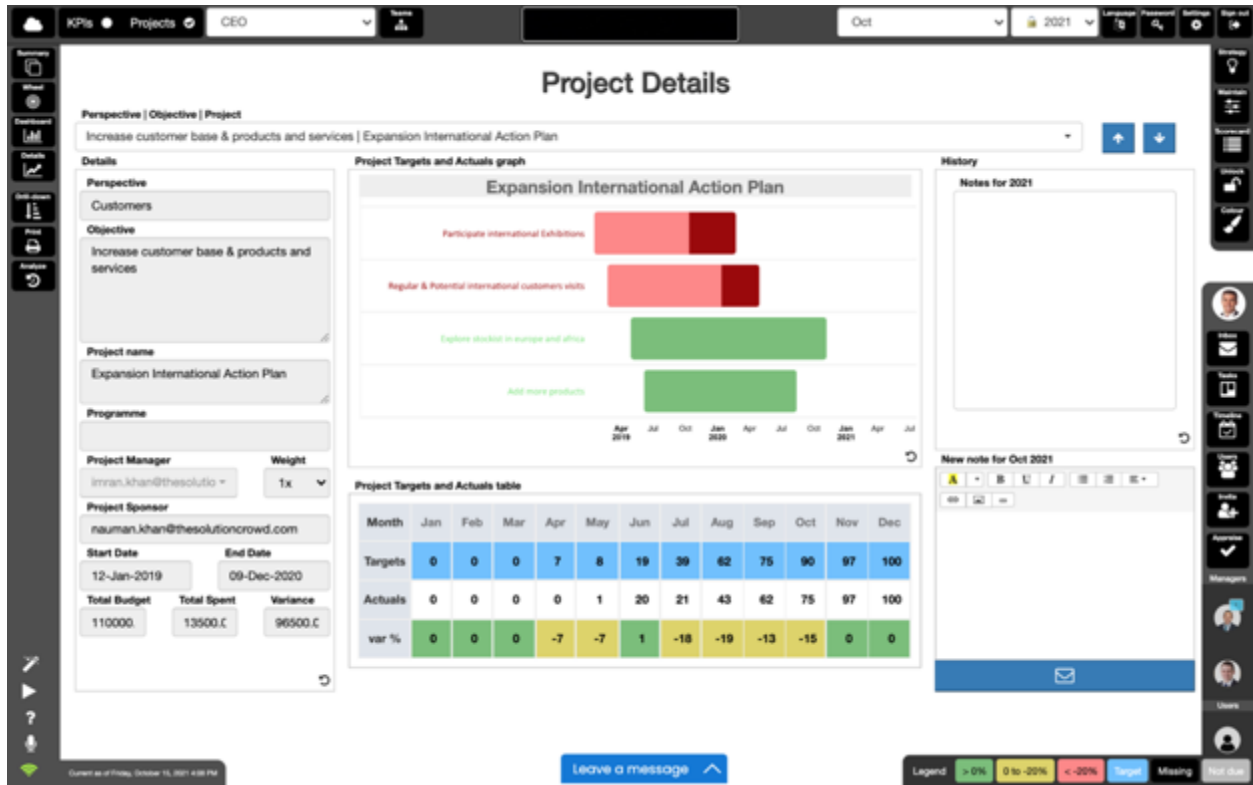
Tasks can be drag and dropped to different statuses in the Tasks screen.

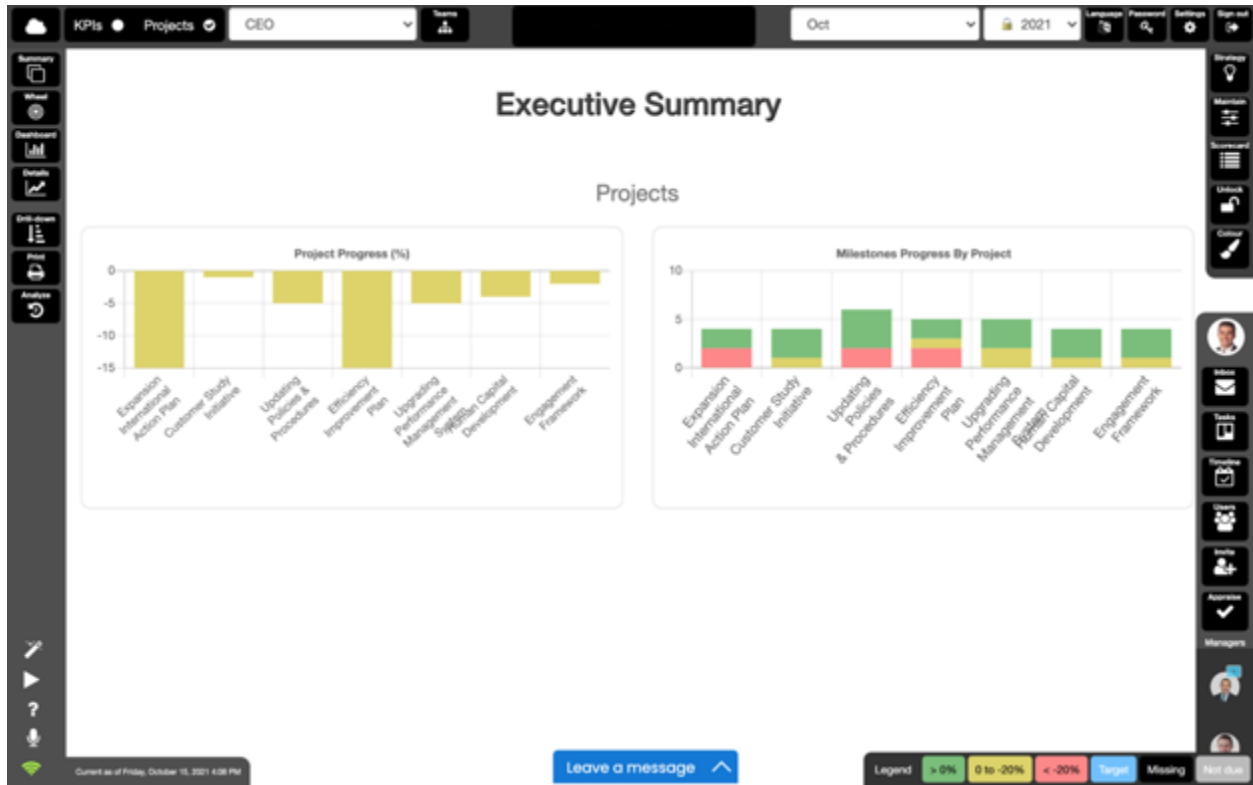


Projects

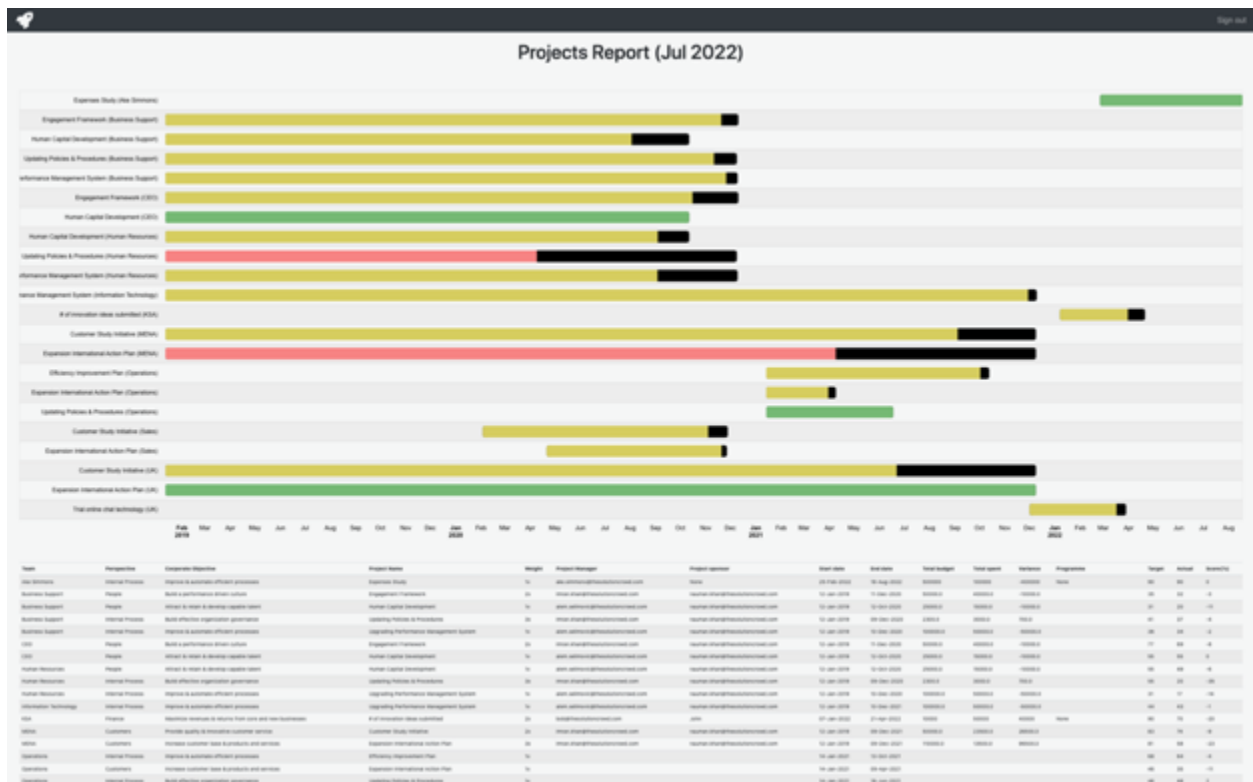
As well as individual and team KPIs, employees can also be made responsible for milestones on key Projects.





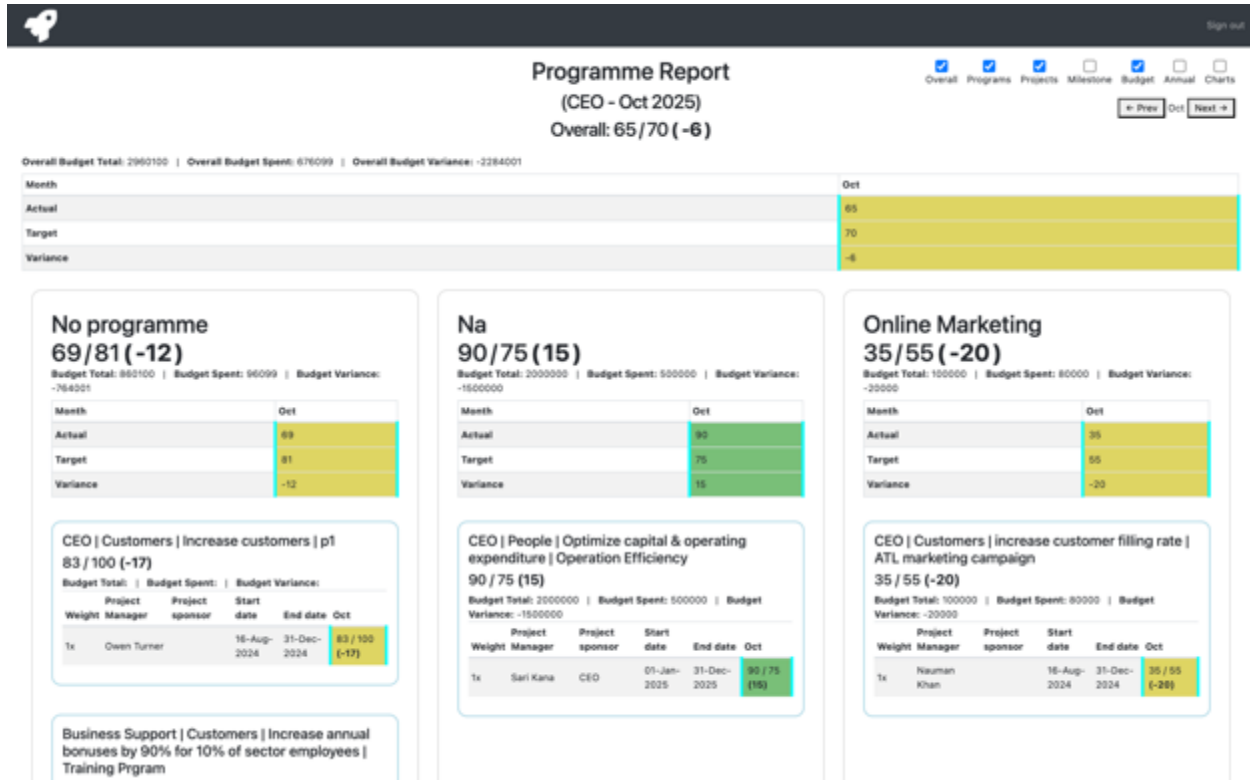


The Projects microapp summarizes all projects and project performance on a Gantt chart.

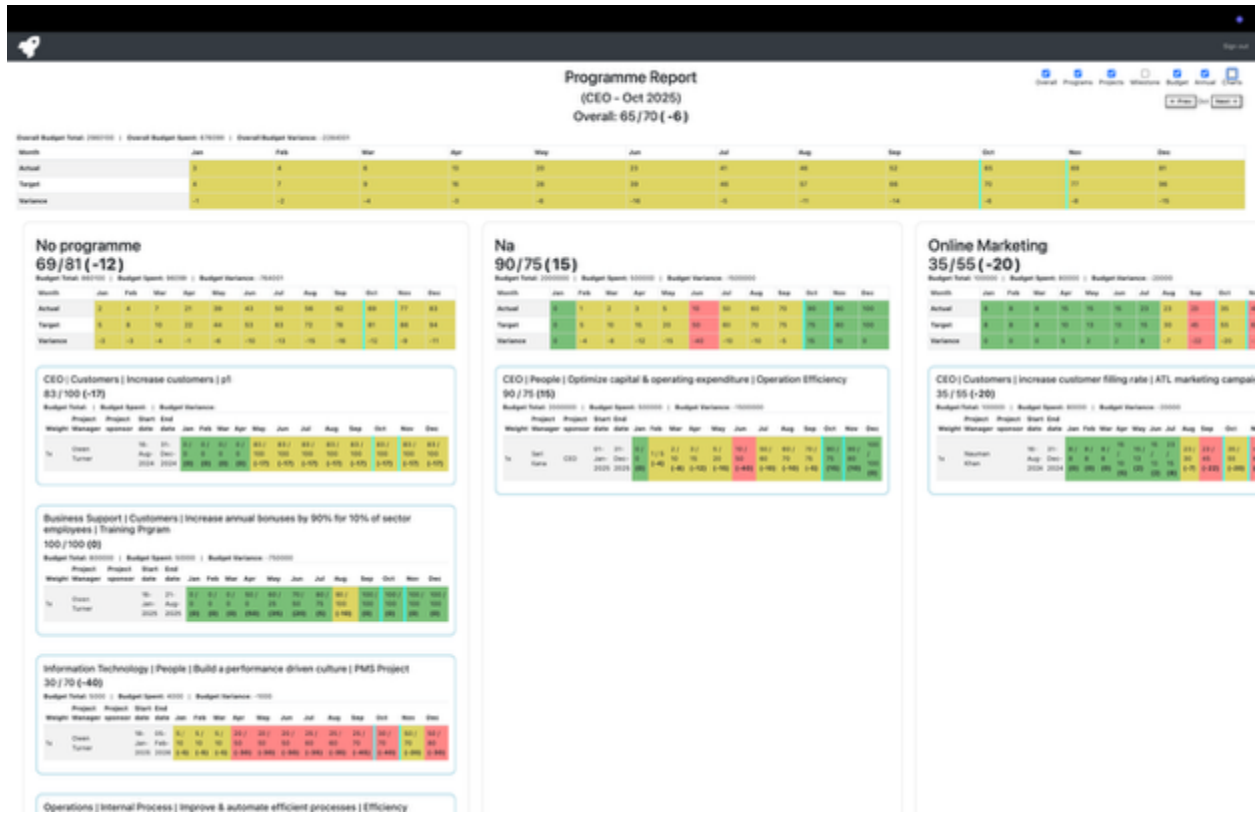


Programmes

Projects can be organized into programmes and then reported upon with information segmented and summarized using the Programme Report.



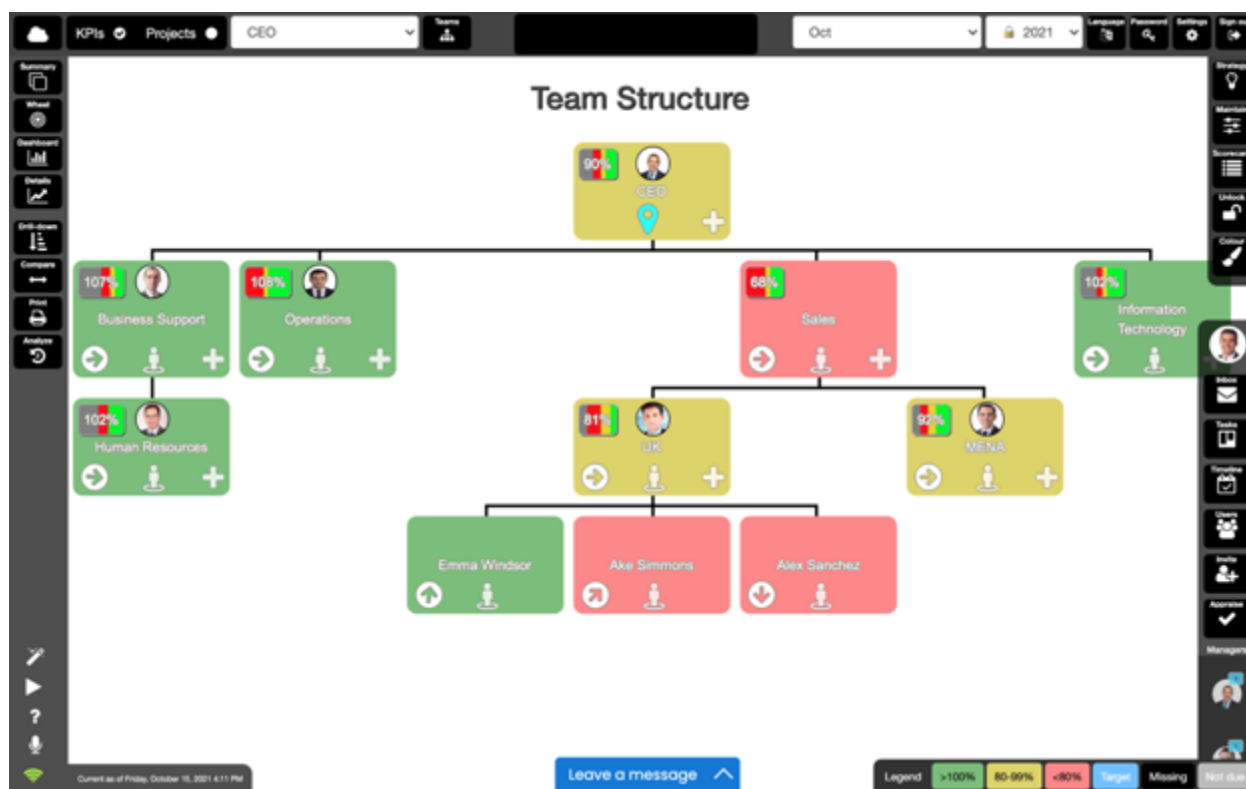
The filters can be used to show and hide information as needed, including charts and annual views.

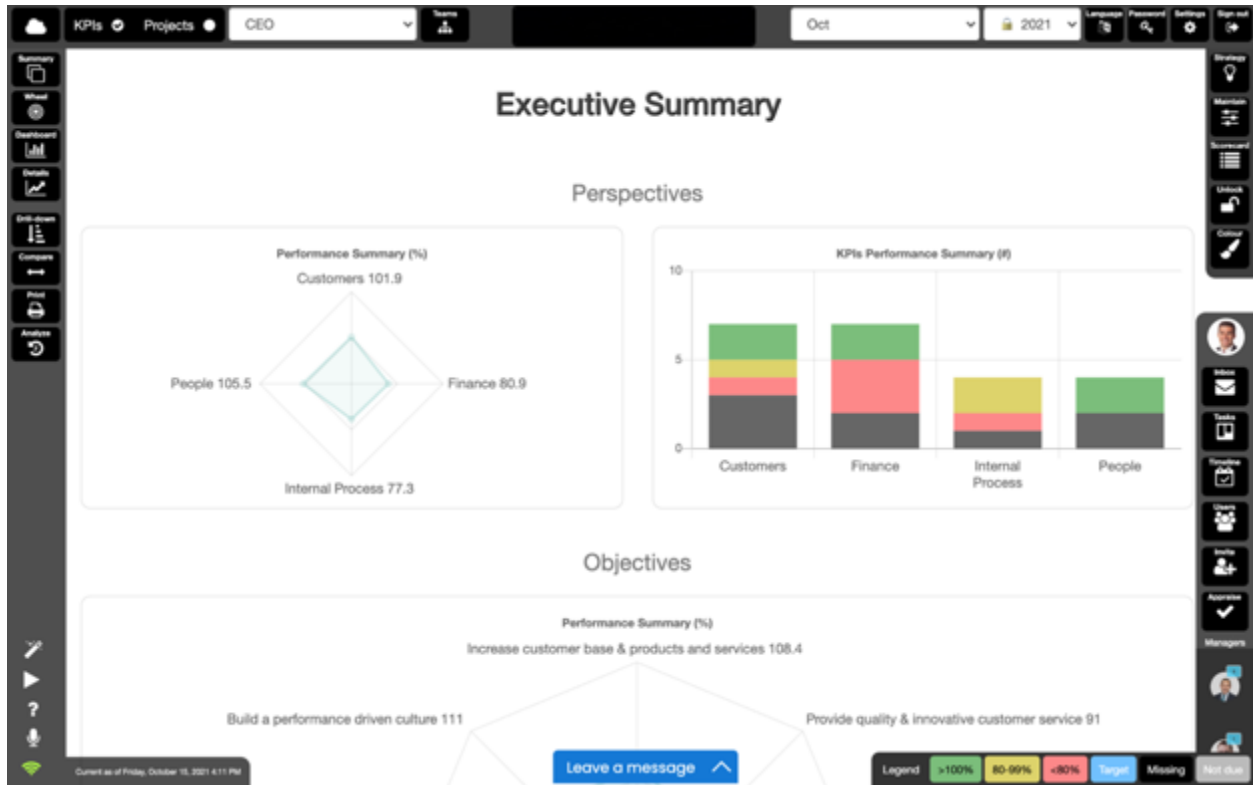


Live dashboards

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.

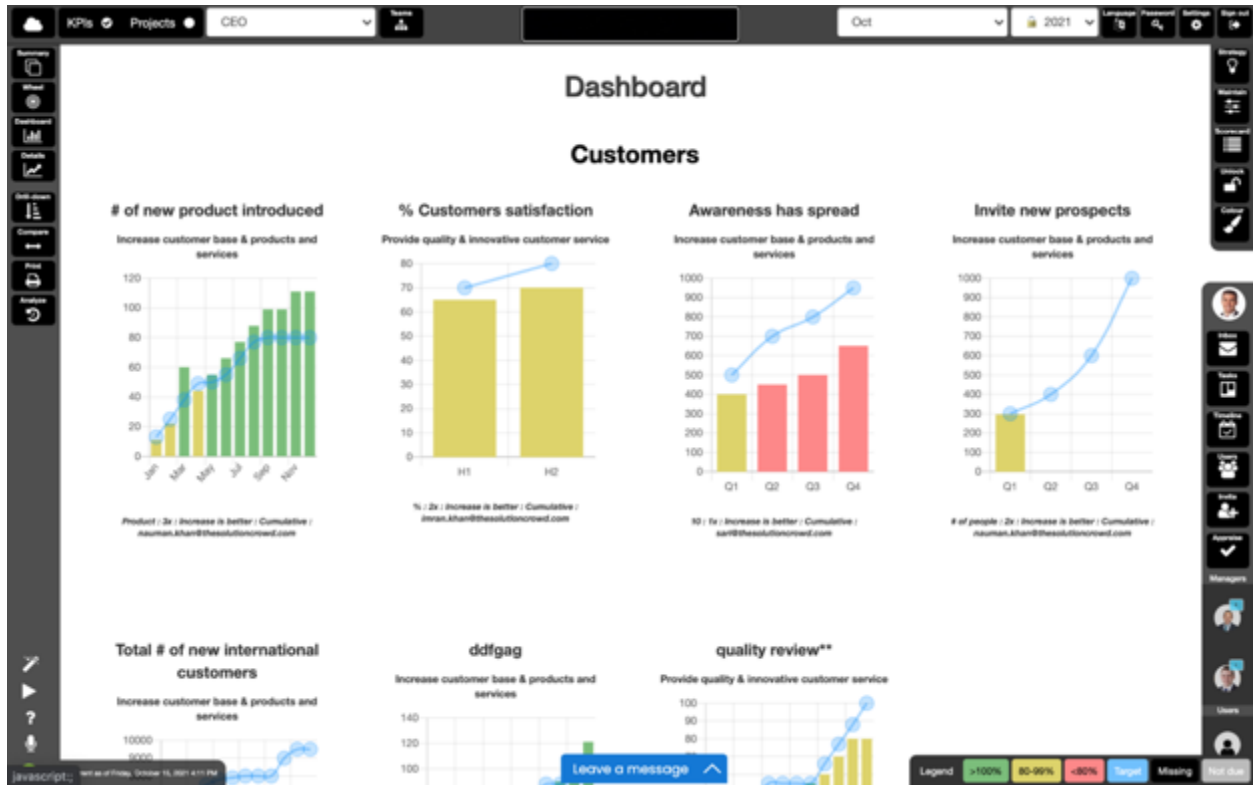






Kippy – Features

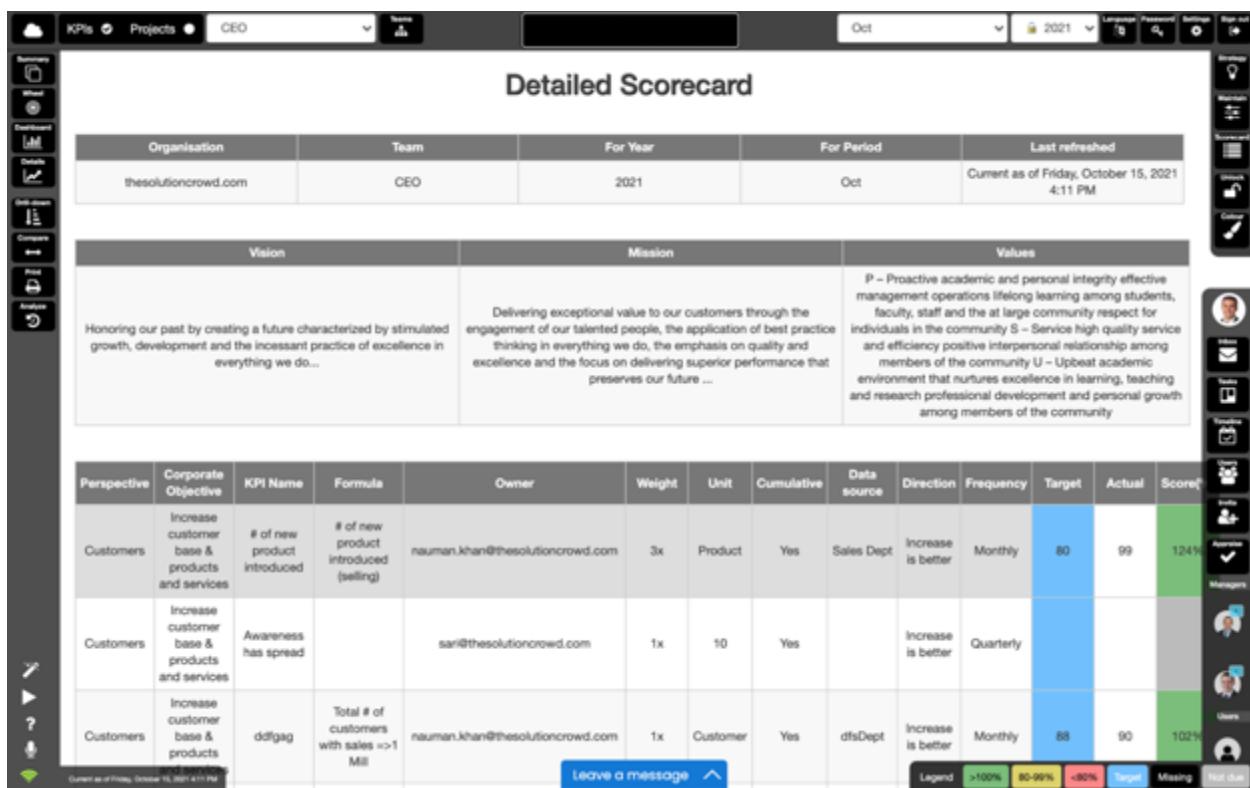




Compare

	CEO	Business Support	MENA	Operations	Information Technology	Human Resources	Sales	Ak
Perspective Customers	101.8%	⊖	101.8%	⊖	⊖	⊖	53.8%	
Objective Increase customer base & products and services	108.4%	⊖	101.5%	⊖		⊖	42.3%	
Objective Provide quality & innovative customer service	91%		⊖		⊖		87%	
Perspective Finance	80.9%	112%	80.3%	106%	100%	120%	83.2%	
Objective Maximize revenues & returns from core and new business	84.4%	⊖		⊖	⊖	⊖		
Objective Optimize capital & operating expenditure	75%	112%	112%	83.5%	100%	120%	100%	
Perspective Internal Process	77.3%	72%	100%	113%	84.5%	126%	57.6%	
Objective Build effective organization governance	⊖	⊖	⊖	79%	⊖	⊖	44.2%	
Objective Improve & automate efficient processes	77.3%	72%	100%	130%	84.5%	126%	111%	
Perspective People	105.5%	136.5%	78.5%	108.7%	125%	83.6%	79.7%	
Objective Attract & retain & develop capable talent	100%	73%	75%	125%	125%	75%	75%	
Objective Build a performance driven culture	111%	200%	82%	100.5%	125%	86.7%	82%	

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

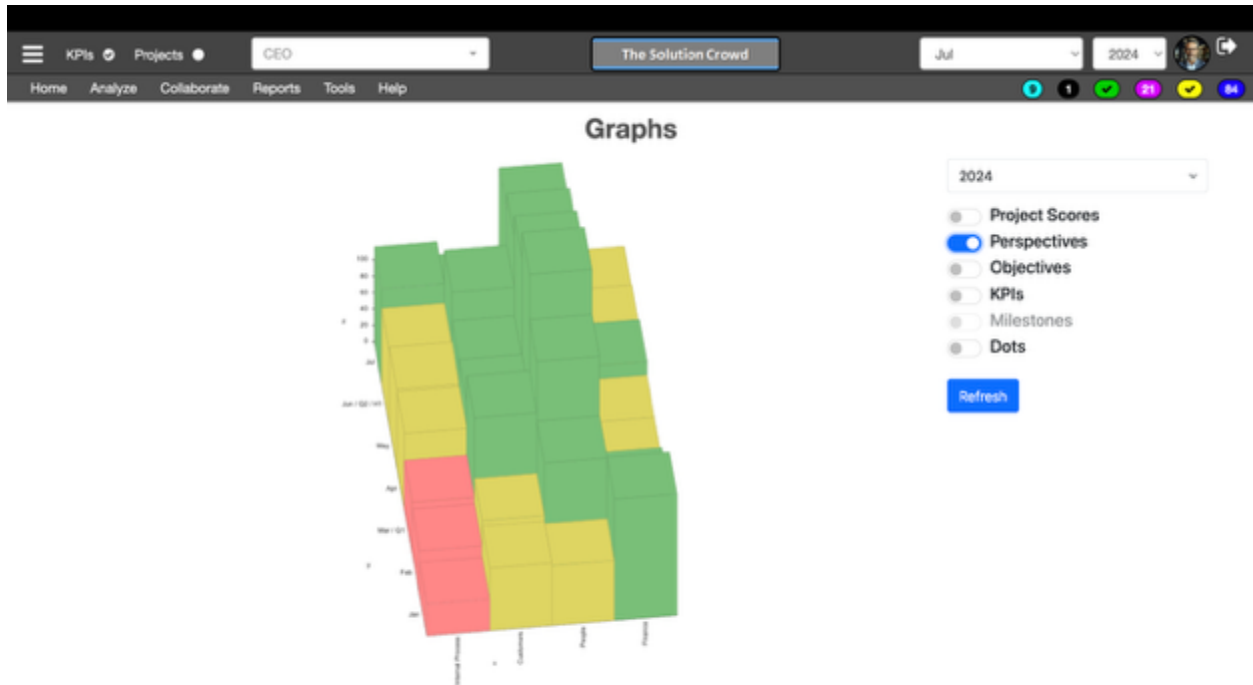


Analyze

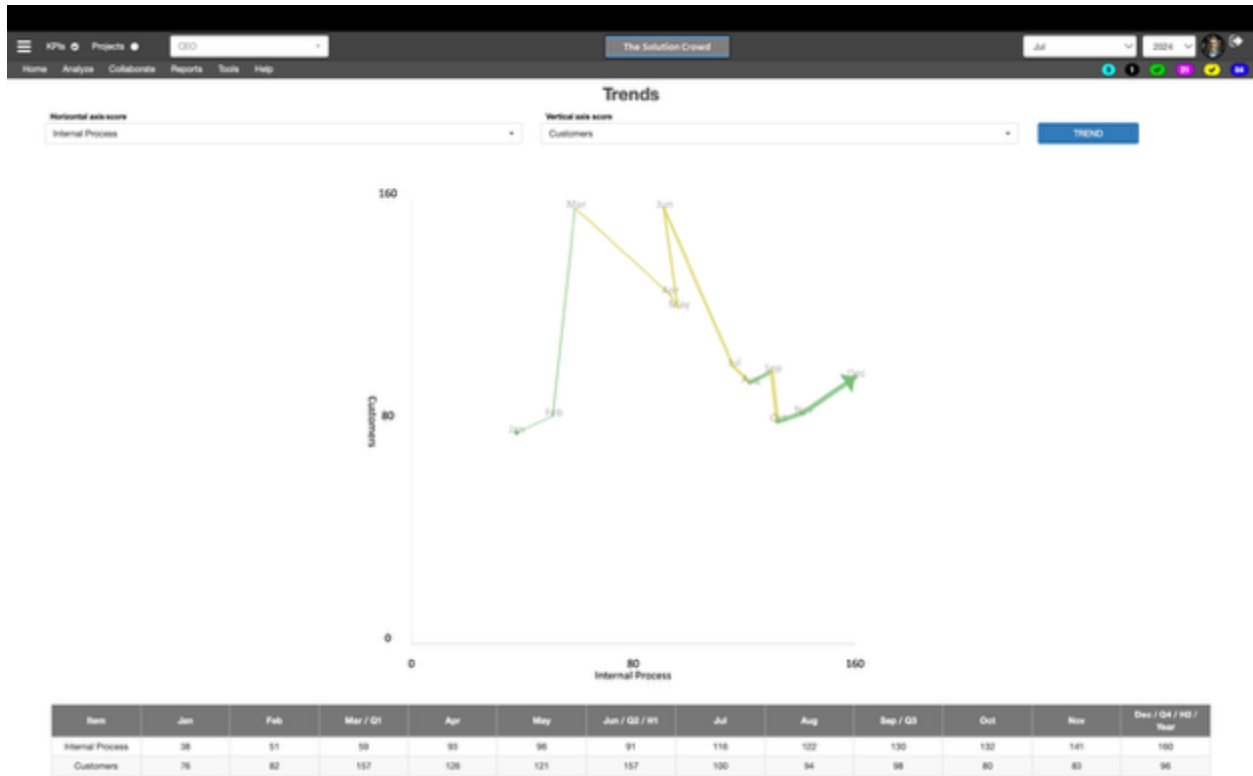
You can analyze your data by different dimensions.



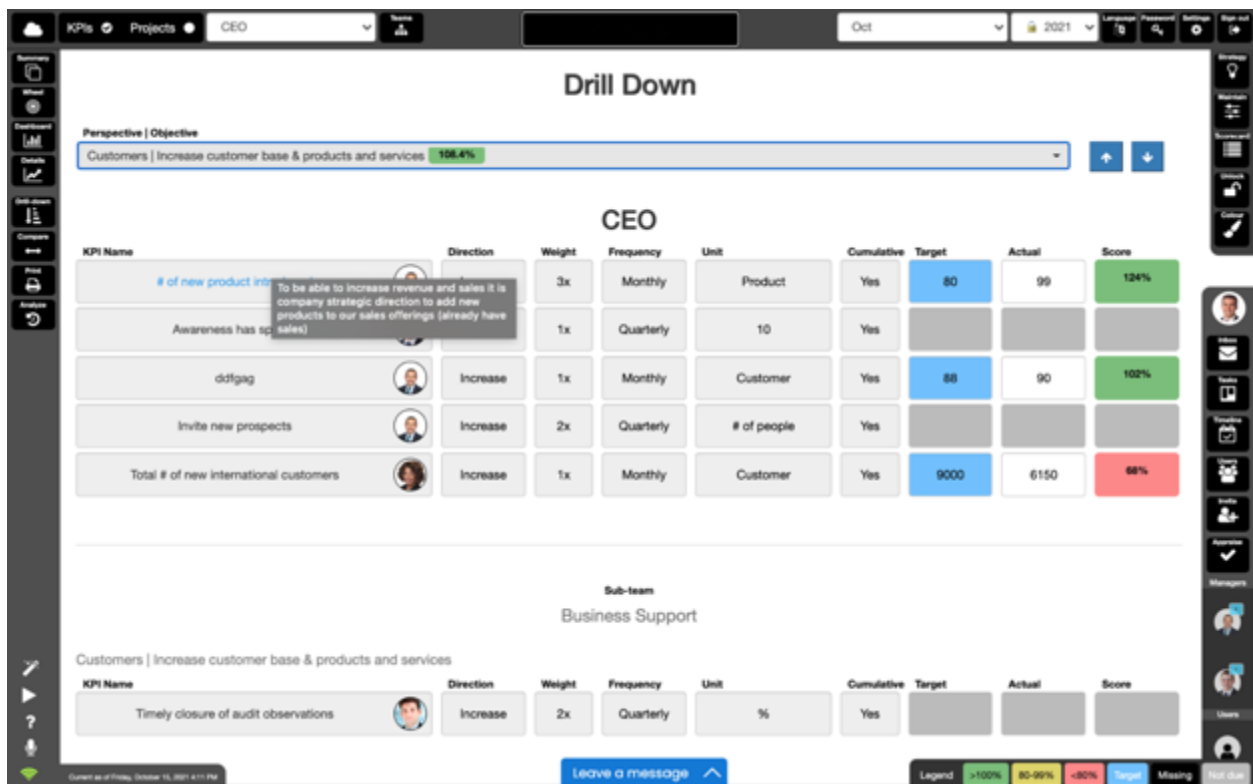
Interact, filter, drill-down and animate the nodes using your mouse. Hover over the filters to learn more.



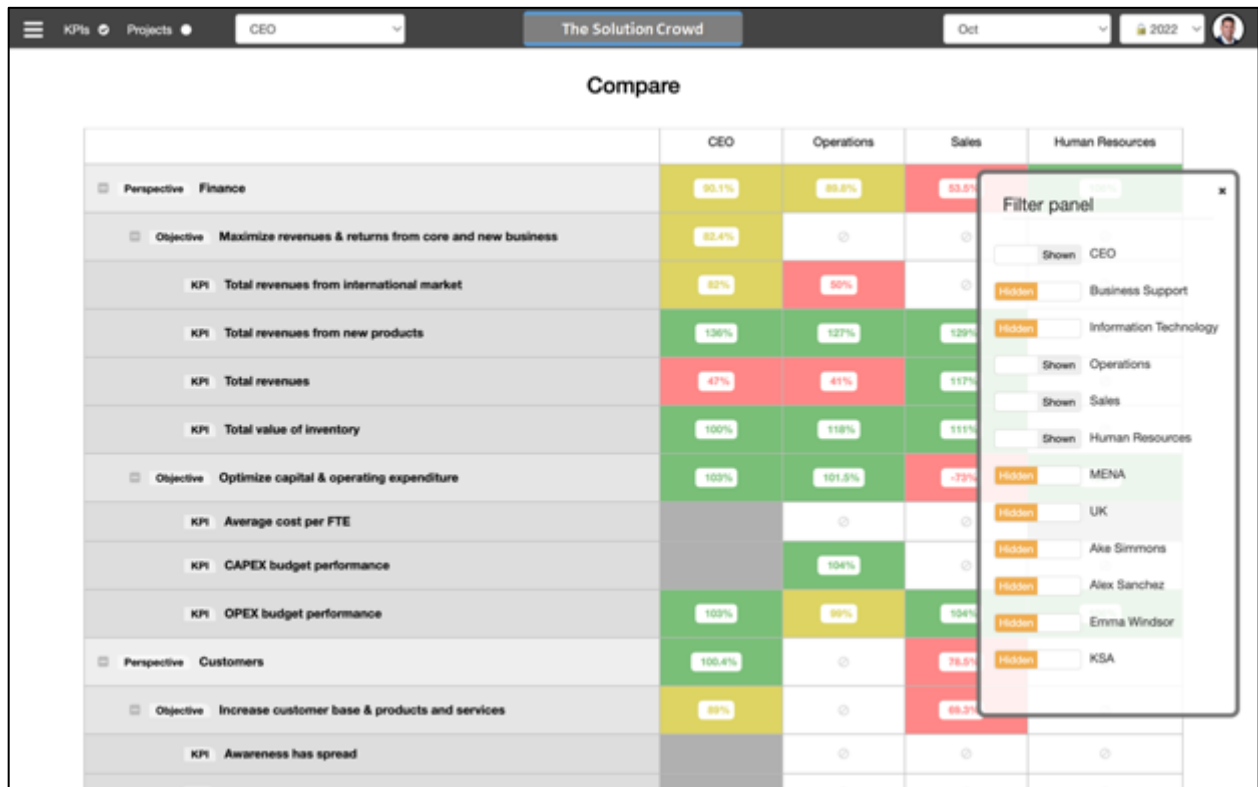
Drag with your mouse to change the perspective. Hover over the filters to learn more.



Compare how two items are trending over the year.



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



The screenshot displays the 'Compare' dashboard in the Kippy application. The top navigation bar includes a menu icon, 'KPIs', 'Projects', a dropdown for 'CEO', the company name 'The Solution Crowd', a date selector for 'Oct', and the year '2022'. The main content area is titled 'Compare' and features a table with columns for different departments: CEO, Operations, Sales, and Human Resources. The table is organized into sections for 'Perspective' (Finance, Customers) and 'Objective'. Each objective is followed by a list of KPIs. Performance values are shown in colored boxes: green for positive, red for negative, and grey for missing data. A 'Filter panel' is open on the right, showing a list of filters with 'Shown' and 'Hidden' toggle buttons. The filters include 'CEO', 'Business Support', 'Information Technology', 'Operations', 'Sales', 'Human Resources', 'MENA', 'UK', 'Ake Simmons', 'Alex Sanchez', 'Emma Windsor', and 'KSA'.

	CEO	Operations	Sales	Human Resources
Perspective Finance				
Objective Maximize revenues & returns from core and new business	93.1%	88.8%	83.5%	
KPI Total revenues from international market	82%	90%		
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	100%	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%		68.3%	
KPI Awareness has spread				

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

Strategy map

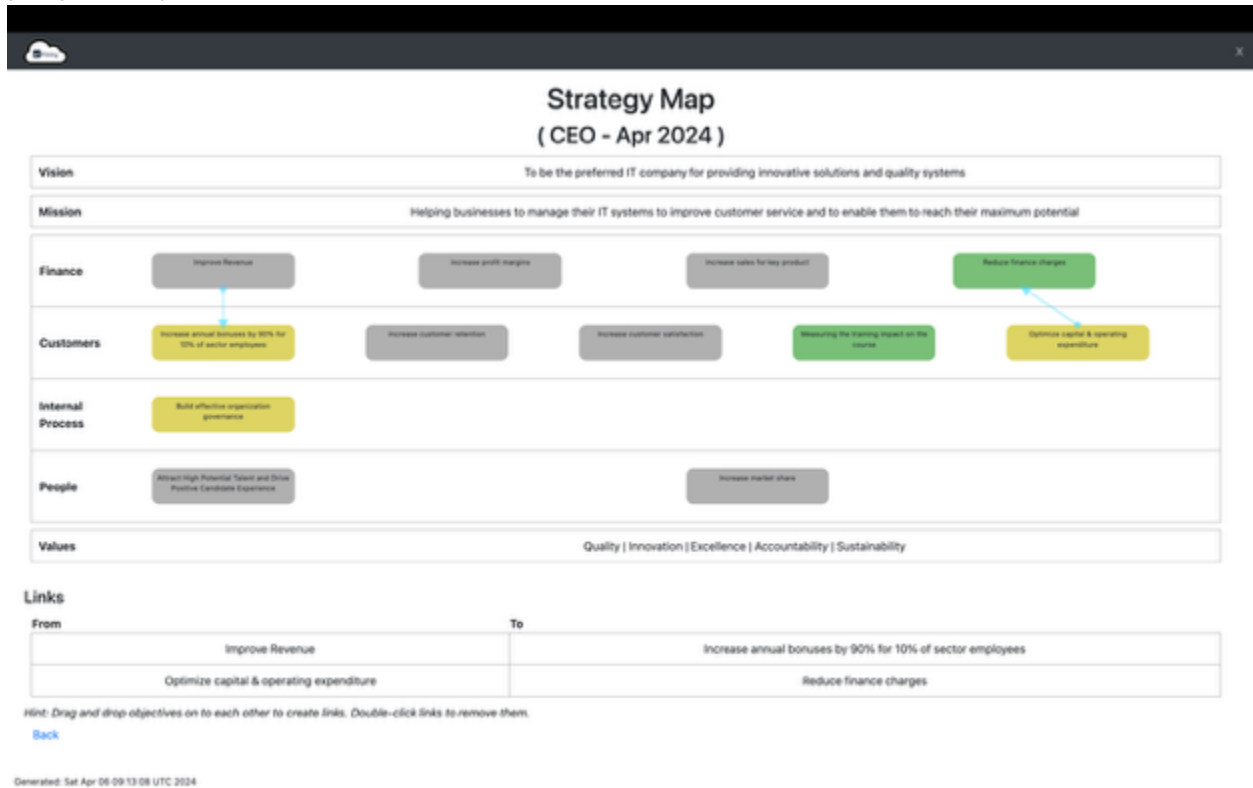
View the org wide strategy on a strategy map.

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

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

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

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



Work list

Quick links to action items for your attention.



In order, they are:

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

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

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

Individual KPIs

2023 > Aug

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

Close

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



Review KPIs

Alem Selimovic (alem.selimovic@thesolutioncrowd.com)

Search

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

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Approve Draft KPIs

Search

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

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



Quick links

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

Org Lens ×

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

Org Report

(Jun 2023)

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

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

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



KPI Lens | CEO



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

Annual Team Report (CEO - 2023)

KPIs

Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Build Leadership capacity and increase Team effectiveness	# of employees on sick leave	1x	Owen Turner	Employee	No	Decrease is better	Quarterly	-1.0 (-1.0)	-1.0 (-1.0)	7.8 (71%)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)
People	Improve HR Infrastructure and Policy Capacity	# of innovation ideas submitted	1x	Alain Salomovic	Idea	Yes	Increase is better	Monthly	5.1 (100%)	5.1 (100%)	5.1 (100%)	5.1 (100%)	5.2 (100%)	5.2 (100%)	5.2 (100%)	5.2 (100%)	5.2 (100%)	5.2 (100%)	5.2 (100%)	5.2 (100%)
Internal Process	Improve & automate efficient processes	# of key business processes improved and/or automated	1x	Imran Khan	Bus. Process	Yes	Increase is better	Monthly	-1.7 (-1.7)	-1.2 (-1.2)	1.3 (33%)	1.5 (39%)	1.5 (39%)	-1.5 (-38%)	2.6 (65%)	2.6 (65%)	2.6 (65%)	-1.6 (-37%)	3.8 (97%)	3.1 (78%)
Finance	Improve Working Capital	# of new product introduced	3x	Nauman Khan	Product	Yes	Increase is better	Monthly	3.1 (300%)	3.1 (300%)	3.1 (300%)	2.1 (200%)	4.2 (400%)	2.2 (210%)	2.2 (210%)	2.2 (210%)	2.3 (220%)	2.3 (220%)	3.3 (320%)	4.3 (420%)
People	Improve HR Infrastructure and Policy Capacity	# projects started	2x	Mike Bower	Unit	Yes	Increase is better	Monthly	1.5 (20%)	1.5 (20%)	1.5 (20%)	2.8 (37%)	3.8 (50%)	3.8 (50%)	3.9 (51%)	5.9 (78%)	5.1 (68%)	5.1 (68%)	9.1 (120%)	10.1 (133%)
Customers	Provide quality & innovative customer service	% Customers satisfaction	2x	Imran Khan	%	Yes	Increase is better	Semi-annual	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	80.7 (80%)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	80.7 (80%)
People	Build Leadership capacity and increase Team effectiveness	% Employees Turnover	1x	Imran Khan	%	Yes	Decrease is better	Semi-annual	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	5.1 (100%)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	10.1 (100%)
Internal Process	Improve & automate efficient processes	% of IT Service tickets closed on time	1x	Imran Khan	%	Yes	Increase is better	Monthly	30.1 (33%)	40.1 (44%)	50.1 (56%)	60.1 (67%)	60.1 (67%)	60.1 (67%)	60.1 (67%)	60.1 (67%)	60.1 (67%)	60.1 (67%)	60.1 (67%)	100.1 (100%)
Finance	Improve Working Capital	% of customer left	2x	Nauman Khan		Yes	Decrease is better	Monthly	-1.1 (-1.1)	11.1 (138%)	11.1 (138%)	11.1 (138%)	40.1 (48%)	12.1 (147%)	16.1 (194%)	16.1 (194%)	16.1 (194%)	16.1 (194%)	19.1 (230%)	20.1 (244%)
Customers	Optimize capital & operating expenditure	Average cost per FTE	1x	Alain Salomovic	Mil. USD	Yes	Decrease is better	Yearly	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	1.79 (140%)
People	Improve HR Infrastructure and Policy Capacity	Average employee satisfaction rating	1x	Alain Salomovic	%	No	Increase is better	Yearly	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	65.7 (87%)
People	Build Leadership capacity and increase Team effectiveness	Average training hours per FTE	1x	Imran Khan	Hour	Yes	Increase is better	Monthly	5.1 (100%)	5.1 (100%)	5.1 (100%)	-0.9 (-18%)	5.1 (100%)	6.1 (120%)	6.1 (120%)	6.1 (120%)	6.1 (120%)	6.1 (120%)	6.1 (120%)	10.1 (196%)
Finance	Improve Working Capital	Awareness has spread	1x	Sari Kana	new prospects	Yes	Increase is better	Quarterly	-1.0 (-1.0)	-1.0 (-1.0)	80.1 (75%)	-1.0 (-1.0)	-1.0 (-1.0)	85.1 (80%)	-1.0 (-1.0)	-1.0 (-1.0)	70.1 (66%)	-1.0 (-1.0)	-1.0 (-1.0)	75.1 (70%)
Customers	Optimize capital & operating expenditure	CAPEX budget performance	2x	Alain Salomovic	%	Yes	Decrease is better	Quarterly	-1.0 (-1.0)	-1.0 (-1.0)	80.1 (158%)	-1.0 (-1.0)	-1.0 (-1.0)	70.1 (138%)	-1.0 (-1.0)	-1.0 (-1.0)	80.1 (158%)	-1.0 (-1.0)	-1.0 (-1.0)	120.1 (83%)
Finance	Improve Working Capital	Customer churn	1x	Owen Turner	000's	Yes	Increase is better	Yearly	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	-1.0 (-1.0)	23.1 (187%)

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



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

Review KPIs

Nauman Khan (nauman.khan@thesolutioncrowd.com)

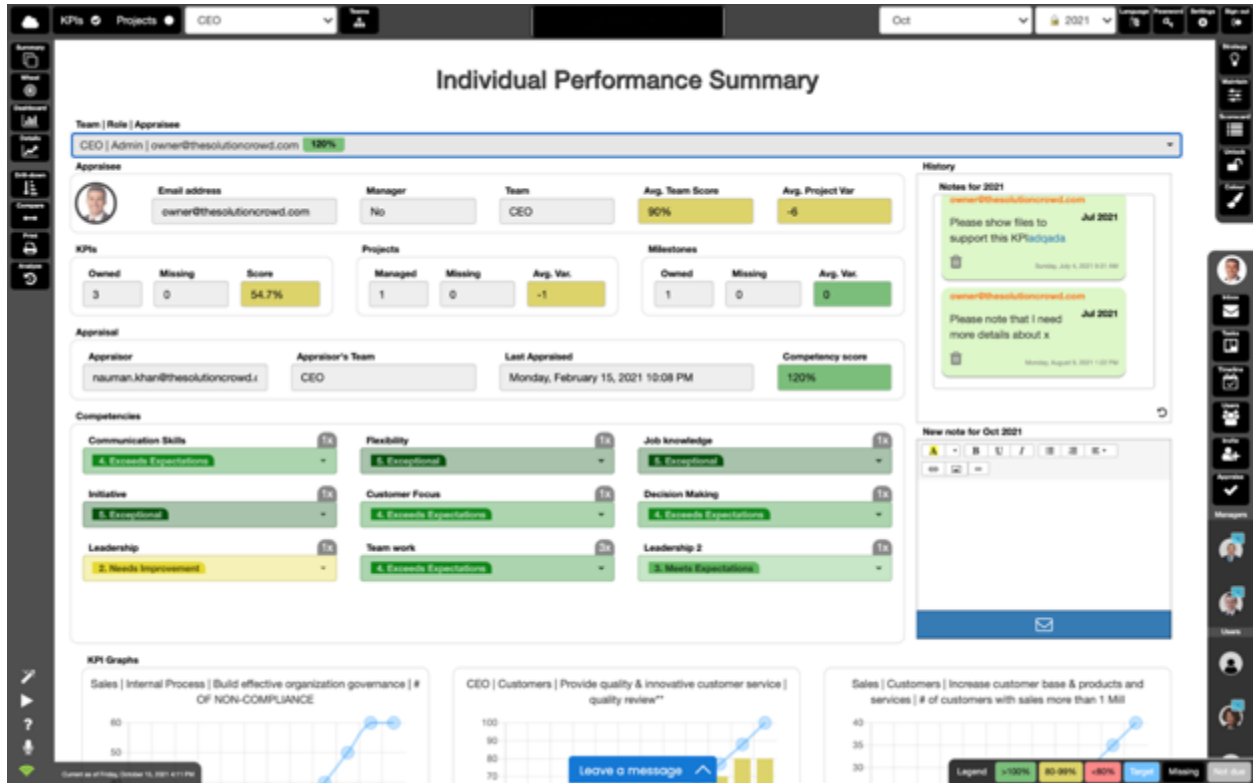
Team	KPI Name	Frequency	Forecast	Actual	Score	Last submission	Approval
CEO	# of new product introduced	Monthly	2	2	100	14-May-2023	Approve
CEO	% of customer left	Monthly	20	12	167	17-Feb-2023	Not needed
CEO	Invite new prospects	Quarterly	5	5	100	07-Jun-2023	Not needed
CEO	Quality review	Monthly	1	2	200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



See Quick Links video for full demo of all screens.

Staff performance

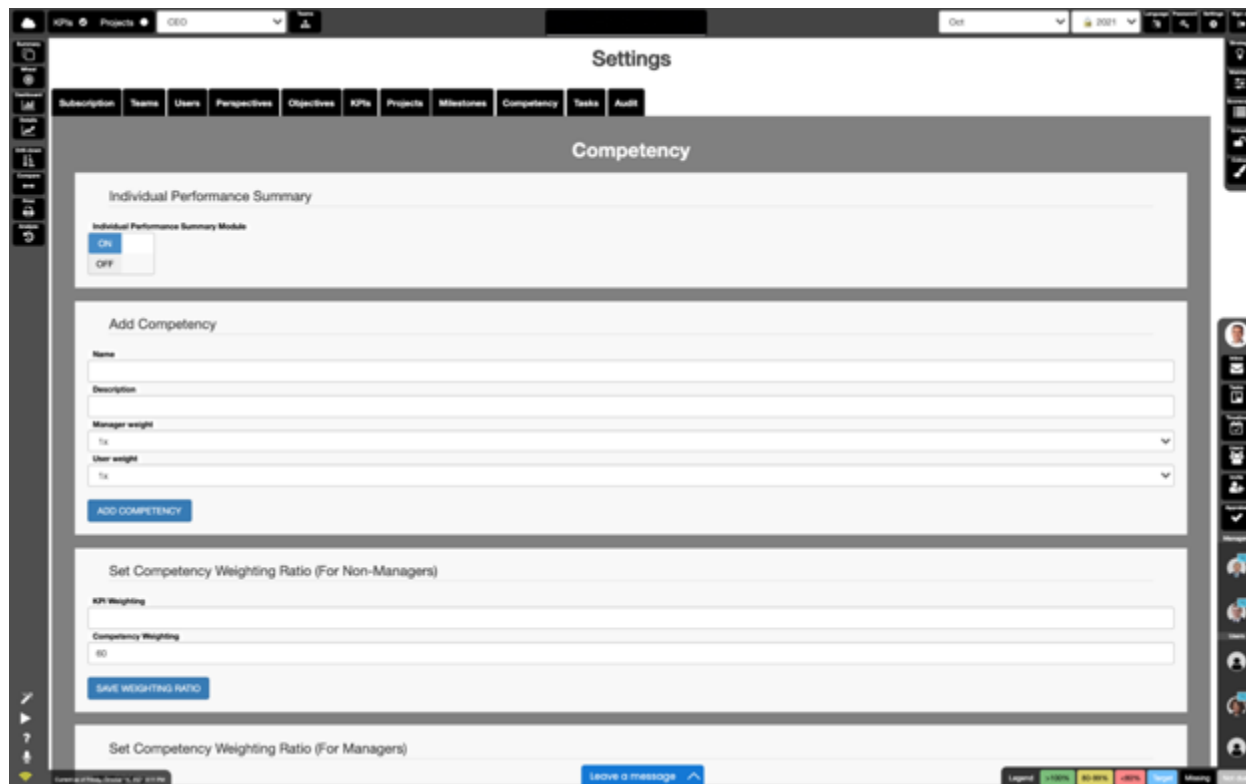
The individual performance summary of each employee shows the live calculated performance score of that employee, in relation to their weighted score based on their forecast and actuals, for all individual and team KPI and milestones they are responsible for.



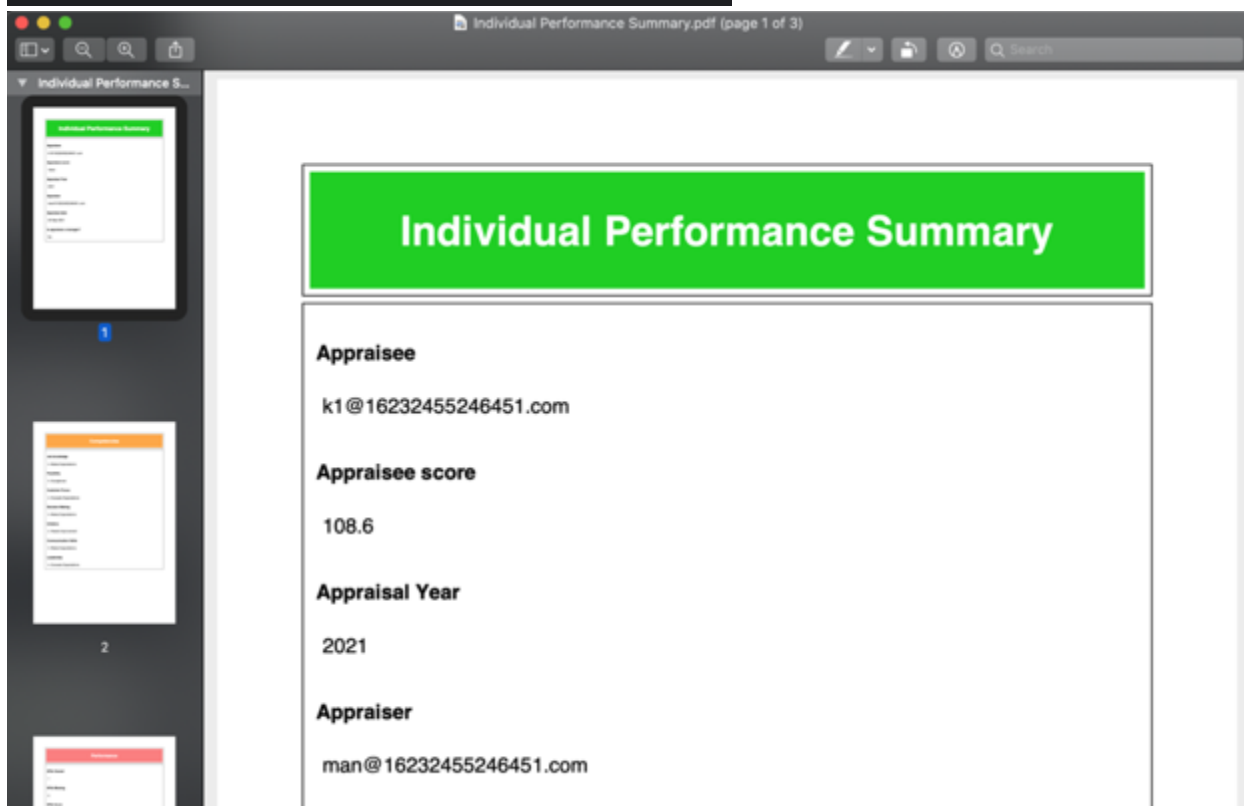
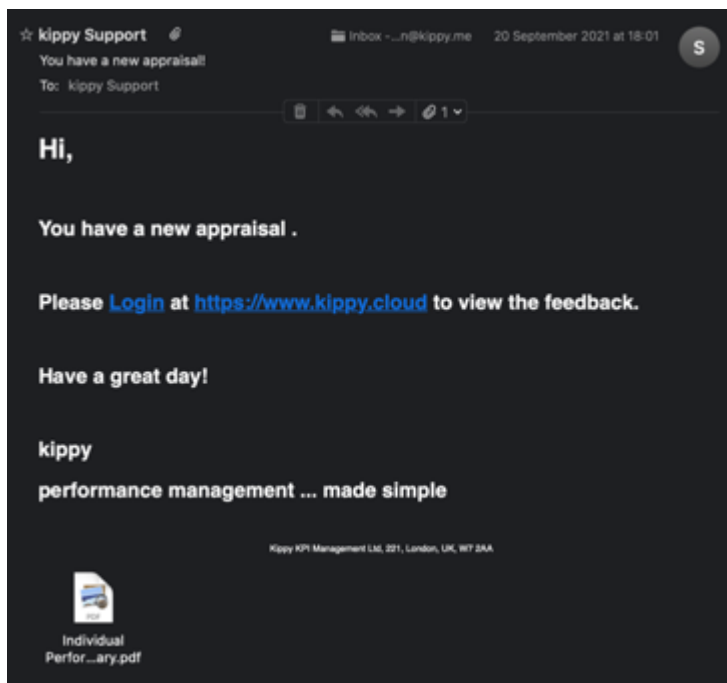
Staff appraisals

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

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



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




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

New note for Oct 2021

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

CD **AD** **CD**

@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

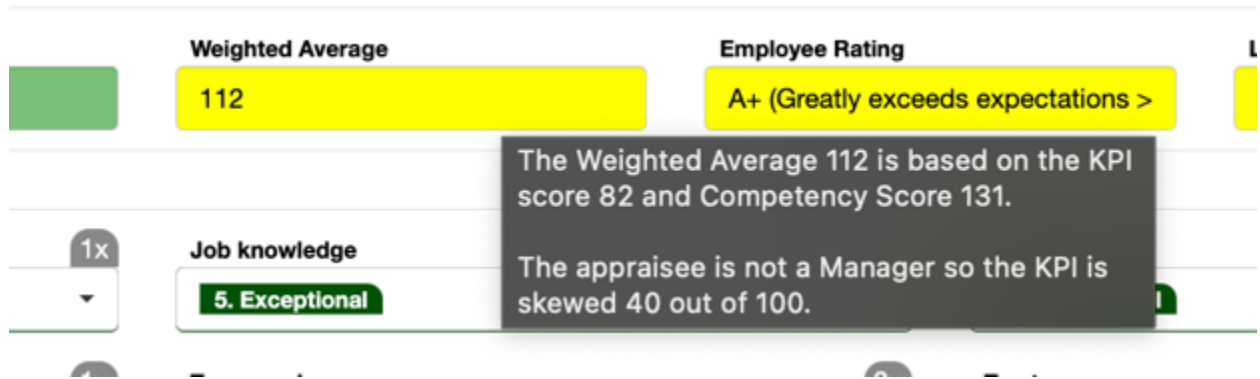
Milestones

Owned 0 **Missing** 0 **Avg. Var.** n/a

Appraisal

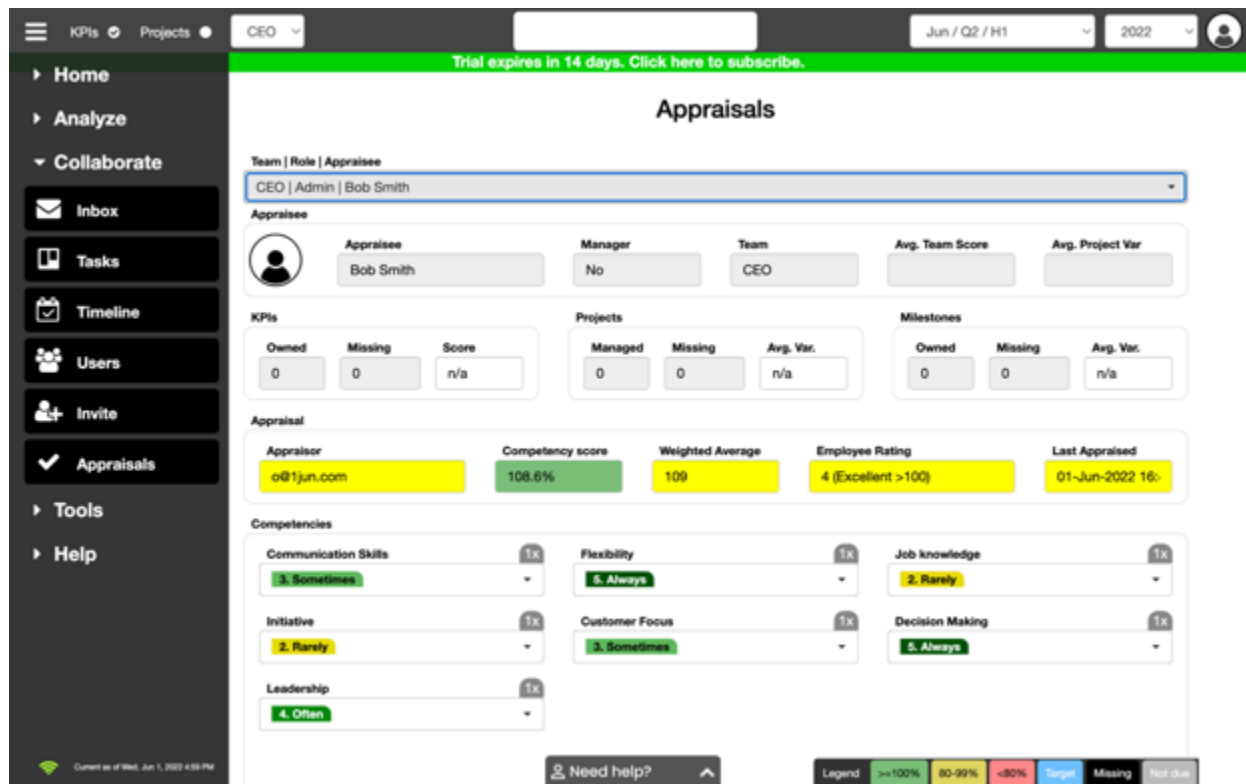
Appraiser sari@thesolutioncrowd.c **Appraiser's Team** CEO **Last Appraised** Saturday, September 4, 2021 2:56 P **Competency score** 105.5%

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



Self appraisals

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

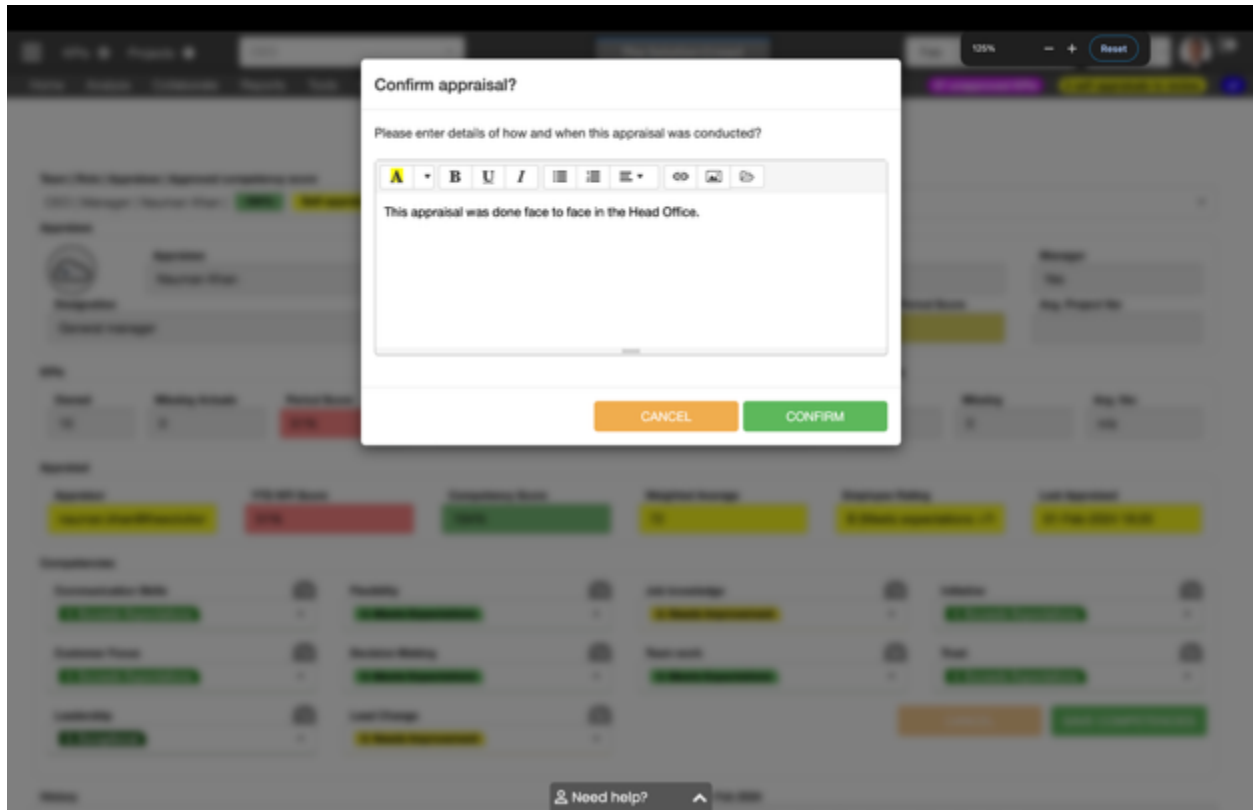


The screenshot shows the 'Appraisals' section of the Kippy interface. The top navigation bar includes 'KPIs', 'Projects', and 'CEO'. A green banner at the top states 'Trial expires in 14 days. Click here to subscribe.' The left sidebar contains navigation options: Home, Analyze, Collaborate, Inbox, Tasks, Timeline, Users, Invite, Appraisals (selected), Tools, and Help. The main content area is titled 'Appraisals' and features a dropdown menu for 'Team | Role | Appraisee' set to 'CEO | Admin | Bob Smith'. Below this, there are sections for 'Appraisee' (Bob Smith), 'Manager' (No), and 'Team' (CEO). The 'Appraisals' section displays a table with columns for 'Owned', 'Missing', and 'Score'. The 'Appraisal' section shows a table with columns for 'Appraiser' (o@tjun.com), 'Competency score' (108.6%), 'Weighted Average' (109), 'Employee Rating' (4 (Excellent >100)), and 'Last Appraised' (01-Jun-2022 16:). The 'Competencies' section lists various skills with their respective scores: Communication Skills (3, Sometimes), Flexibility (5, Always), Job knowledge (2, Rarely), Initiative (2, Rarely), Customer Focus (3, Sometimes), Decision Making (5, Always), and Leadership (4, Often). A legend at the bottom right indicates color-coded status: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

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

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

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





Employee Ratings

HR Report

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

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

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



Employee Rating Report

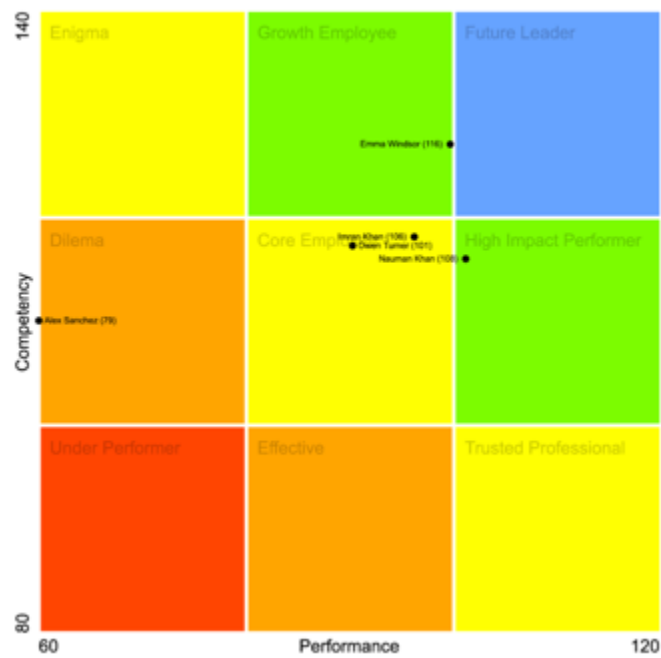
Employee email	Is manager	KPI Score	Comp Score	Avg	Weighted Avg	Rating
lina@thesolutioncrowd.com	Yes					
alex.sanchez@thesolutioncrowd.com	No	0		0	0	1 (Poor <60)
nesrain@thesolutioncrowd.com	Yes					
ake.simmons@thesolutioncrowd.com	No	50		50	50	1 (Poor <60)
mike@thesolutioncrowd.com	Yes		85	85	85	3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

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


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



The 9-Box Grid





 Sign out

The 9-Box Grid (Team Filter)

Period

Jun / Q2 / H1

Year

2023

Team

1: CEO

Tree depth

This team only


Grade

--All grades--

Designation

--All designations--

[Back](#) [Search](#)

 Sign out

Emma Windsor	4	Emma Windsor	No	Senior	Business Development	133	74	98	3 (Good 80-100)
Ake Simmons	4	Ake Simmons	No	Junior	Sales rep	94		94	3 (Good 80-100)
Imran Khan	3	UK	Yes	Executive	Acting Operations Senior Manager	113	65	94	3 (Good 80-100)
Mike Bownl	2	Information Technology	Yes		IT Manager	74	112	89	3 (Good 80-100)
Hi Jones	1	CEO	No	Associate	PA	84	90	87	3 (Good 80-100)
Nesrain Etihad	2	Sales	Yes		Sales Manager	76	83	78	2 (Average 60-80)
Lina Maher	2	Business Support	Yes	Senior manager	Project manager		72	72	2 (Average 60-80)
Business Support 1	3	Business Support 1	No						

Notes

Notes for Nauman Khan

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

Notes for Bobby Blake

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









































Notes for Owen Turner

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

[Back](#) [Print](#) [Team Filter](#) [User Filter](#)

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

Competencies

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

Overview

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

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

Competencies

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

Overview

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

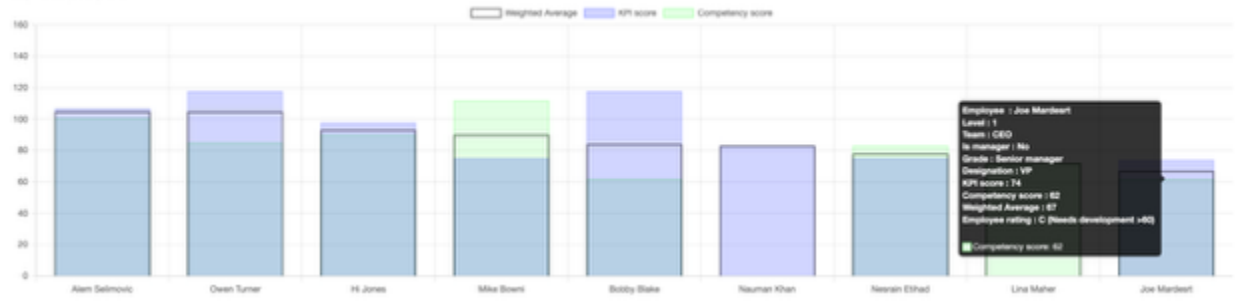
Notes

Interactive graphs also show ordered performance by employees and teams.

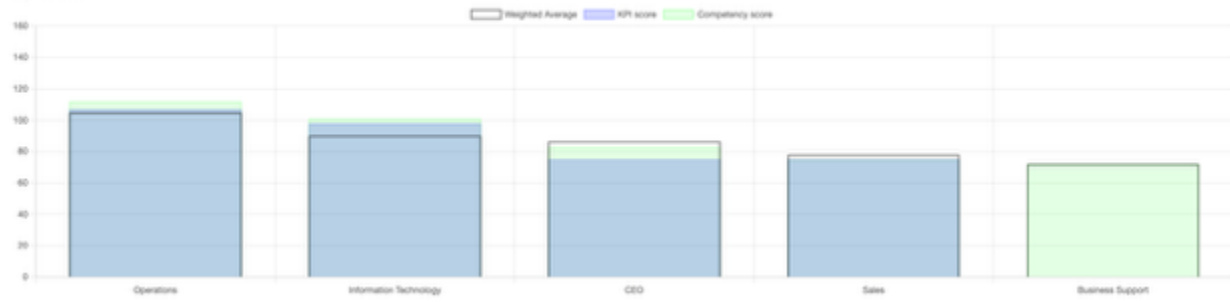


Kippy – Features

By employee



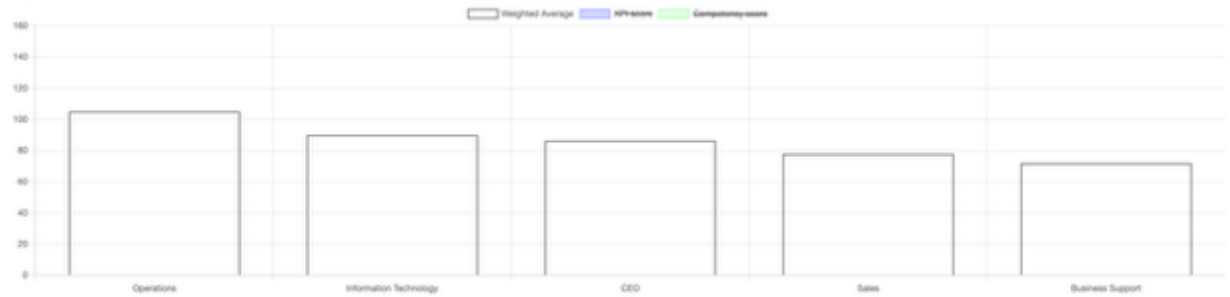
By team

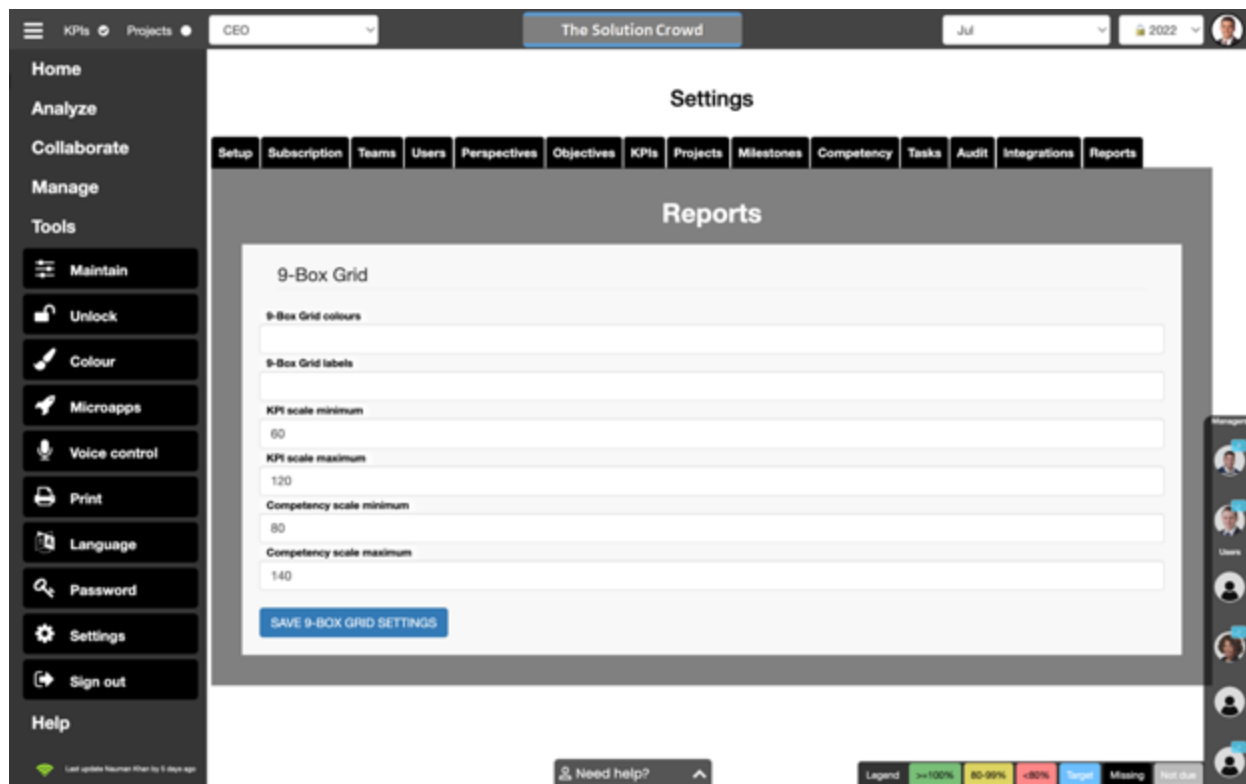


By team



By team






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

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



Sign out

Last appraisals report (Apr 2024)

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

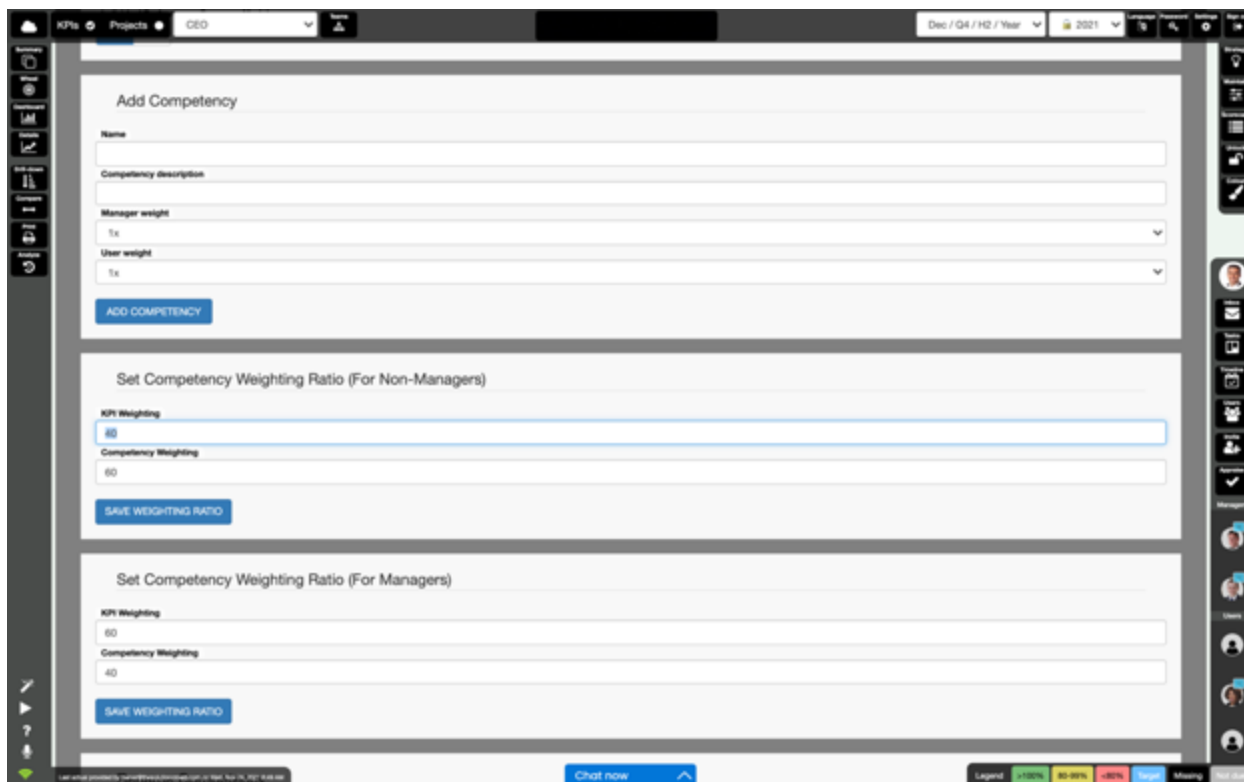
[Back](#) [Print](#) [Download](#)

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

Competencies, grades and weightings

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

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

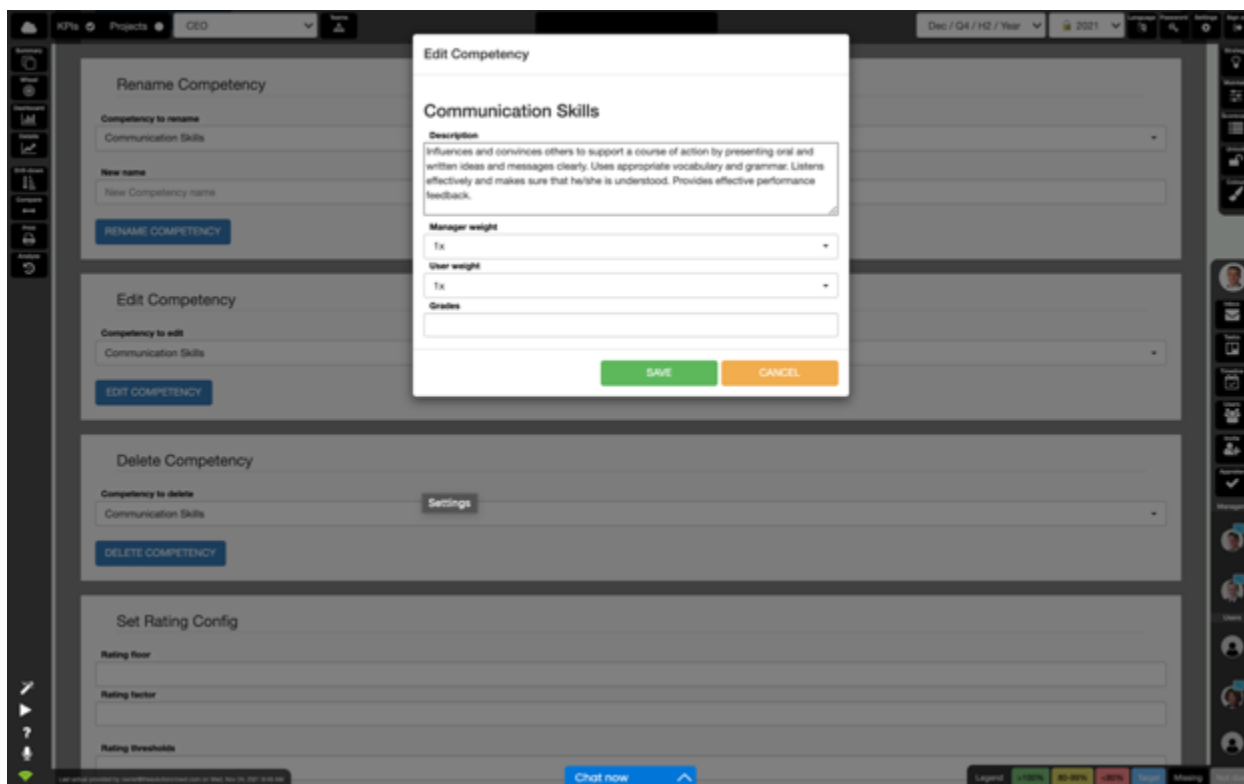


The screenshot shows the 'Add Competency' form in the Kippy application. The form is divided into three main sections:

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

The interface includes a top navigation bar with 'KPIs', 'Projects', and 'CEO' tabs. A right sidebar contains various icons for navigation and settings. A bottom status bar shows a 'Chat now' button and a legend with color-coded indicators.

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

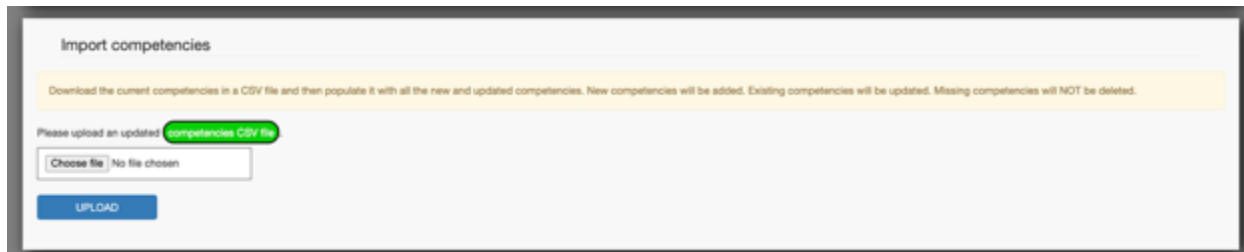


The screenshot shows the 'Edit Competency' form in the Kippy application. The form is divided into four main sections:

- Rename Competency:** Contains fields for 'Competency to rename' (set to 'Communication Skills') and 'New name' (set to 'New Competency name'). A blue 'RENAME COMPETENCY' button is at the bottom.
- Edit Competency:** Contains fields for 'Competency to edit' (set to 'Communication Skills') and 'New name' (set to 'New Competency name'). A blue 'EDIT COMPETENCY' button is at the bottom.
- Delete Competency:** Contains fields for 'Competency to delete' (set to 'Communication Skills') and 'New name' (set to 'New Competency name'). A blue 'DELETE COMPETENCY' button is at the bottom.
- Set Rating Config:** Contains fields for 'Rating floor', 'Rating factor', and 'Rating thresholds'. A blue 'SET RATING CONFIG' button is at the bottom.

The interface includes a top navigation bar with 'KPIs', 'Projects', and 'CEO' tabs. A right sidebar contains various icons for navigation and settings. A bottom status bar shows a 'Chat now' button and a legend with color-coded indicators.

Competencies can also be added in bulk.



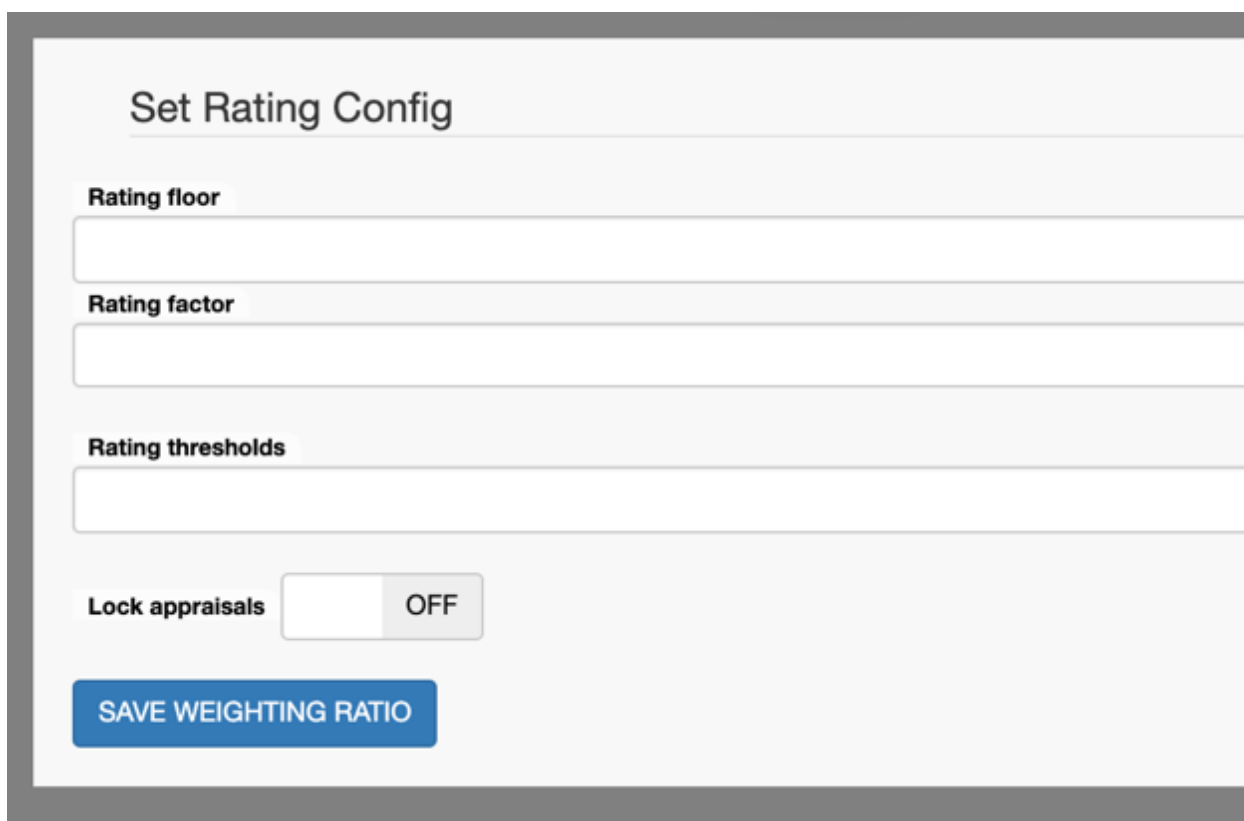
Import competencies

Download the current competencies in a CSV file and then populate it with all the new and updated competencies. New competencies will be added. Existing competencies will be updated. Missing competencies will NOT be deleted.

Please upload an updated **competencies CSV file**

No file chosen

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



Set Rating Config

Rating floor

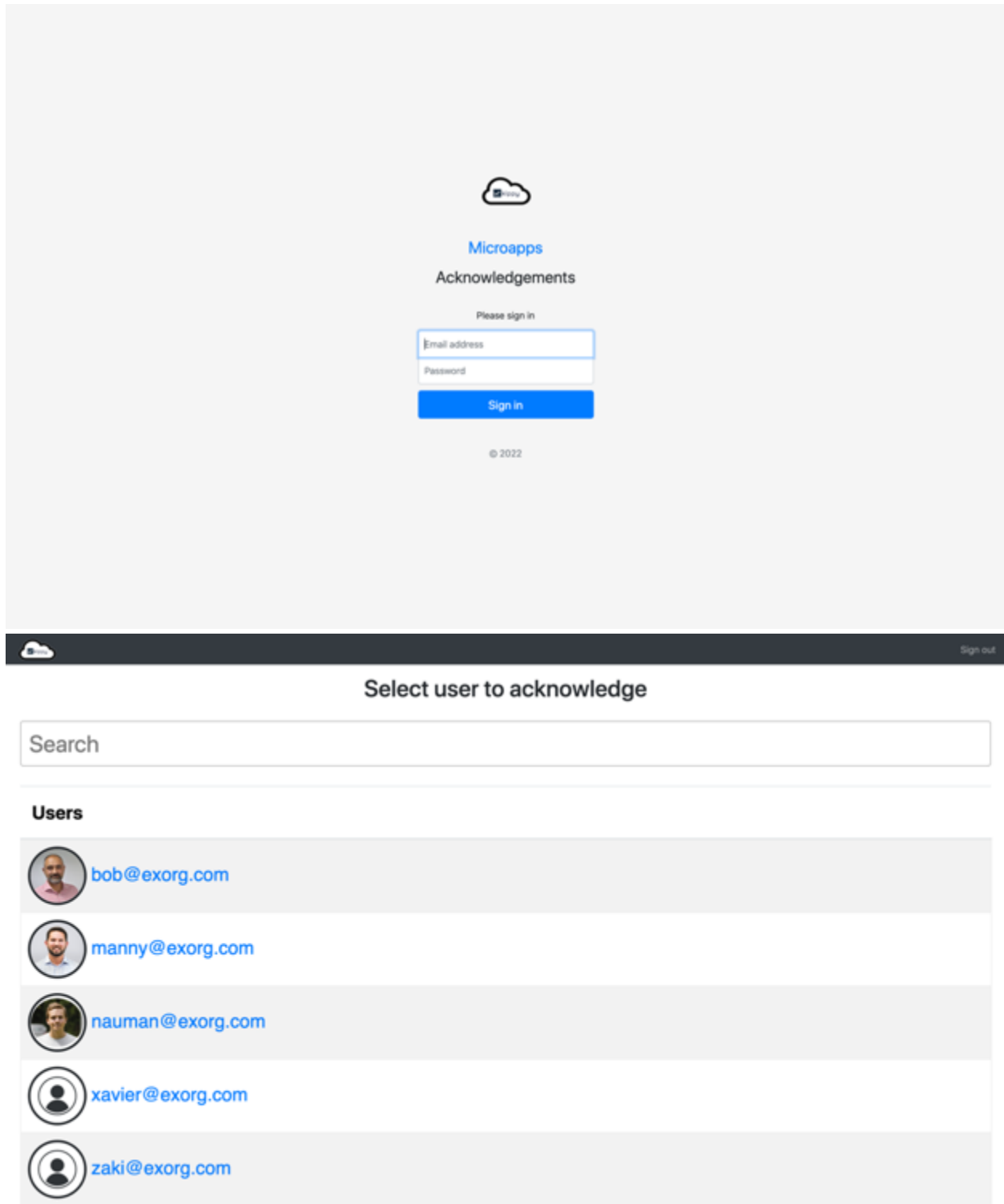
Rating factor

Rating thresholds

Lock appraisals ☐ OFF

Acknowledgements and 360-degree Feedback

Users can leave acknowledgements for other users.



The screenshot displays the 'Microapps Acknowledgements' page. At the top, there is a Kippy logo and the text 'Microapps Acknowledgements'. Below this, a sign-in form is visible with fields for 'Email address' and 'Password', and a 'Sign in' button. A copyright notice '© 2022' is located below the sign-in form. The bottom section of the page is titled 'Select user to acknowledge' and features a search bar. Below the search bar, a list of users is shown, each with a profile picture and an email address: bob@exorg.com, manny@exorg.com, nauman@exorg.com, xavier@exorg.com, and zaki@exorg.com. The list is alternatingly shaded with light gray and white background colors.

Microapps
Acknowledgements

Please sign in

Email address

Password

Sign in






© 2022

Sign out

Select user to acknowledge

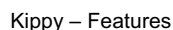
Search

Users

-  bob@exorg.com
-  manny@exorg.com
-  nauman@exorg.com
-  xavier@exorg.com
-  zaki@exorg.com

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

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



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

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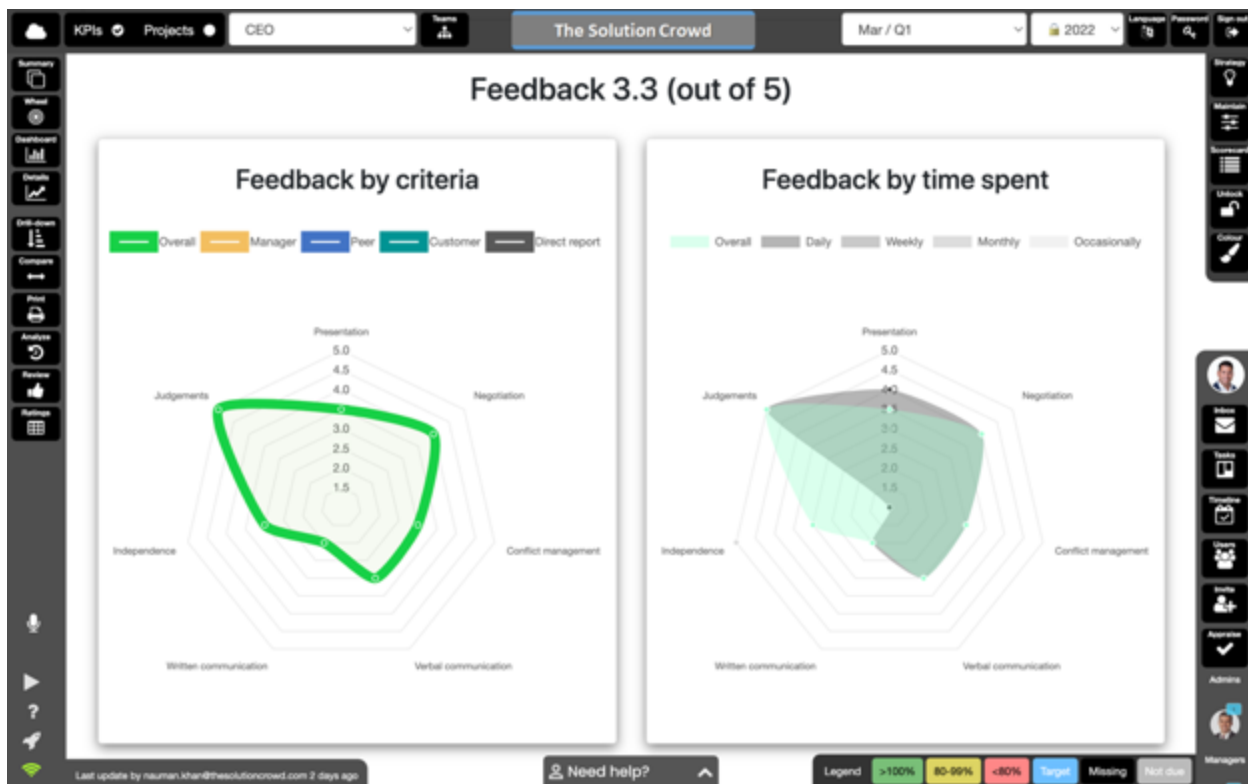


The feedback can also be left via the main kippy app clicking on a user's avatar.

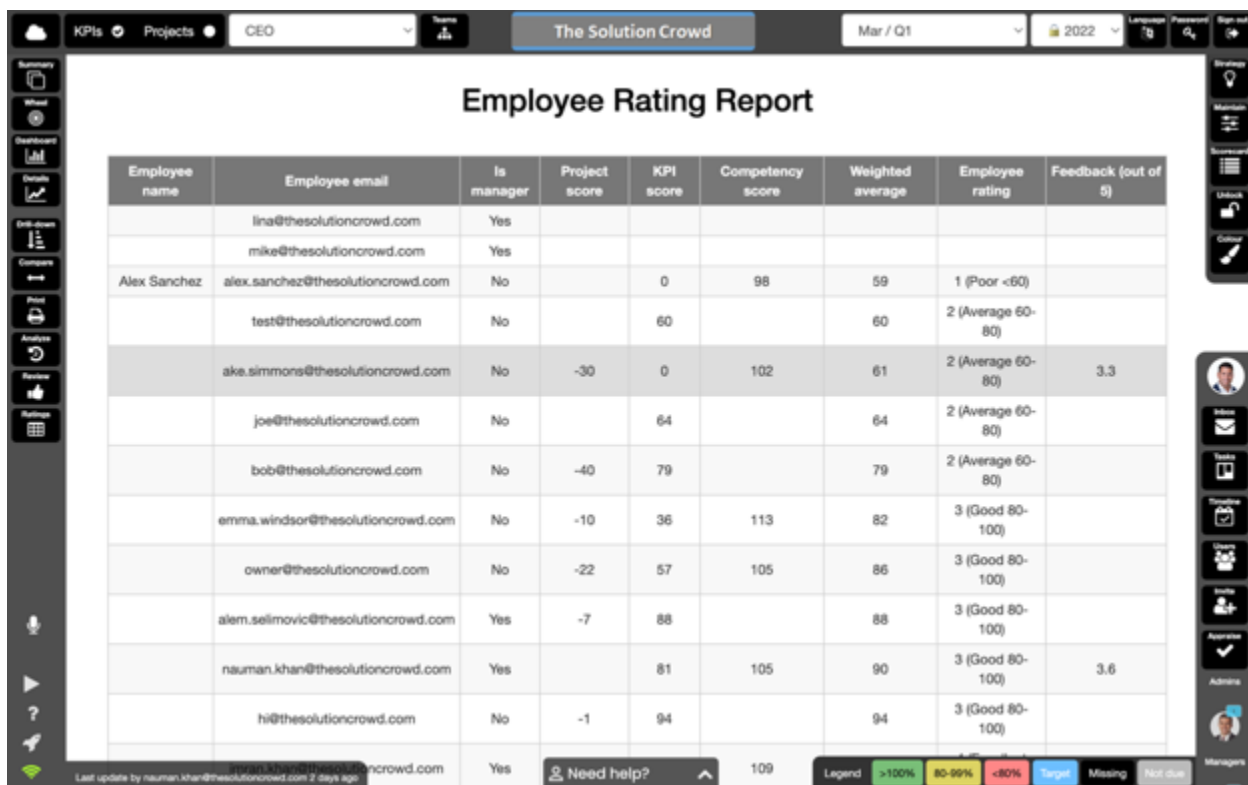
The feedback criteria are configurable in the setting screen.

The screenshot shows the Kippy app interface. At the top, there's a navigation bar with 'KPIs', 'Projects', 'CEO', and a date selector 'Mar / Q1' and '2022'. Below this, the main content area is divided into two sections. The first section, 'Set Rating Config', has a 'DELETE COMPETENCY' button at the top. It contains four input fields: 'Rating floor', 'Rating factor', 'Rating thresholds', and a 'Lock appraisals' toggle switch set to 'OFF'. A 'SAVE WEIGHTING RATIO' button is at the bottom of this section. 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 interface includes a left sidebar with various icons and a right sidebar with user-related icons. At the bottom, there's a status bar with '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.seimovic@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% (Green), 80-99% (Yellow), <80% (Red), Target (Blue), Missing (Grey), Not due (Grey)



Reports

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

Team Report

Home

Analyze

Collaborate

Reports

Team report

HR Report

KPIs report

Projects report

Milestones

Users report

Objectives

Org report

Risk report

9-Box Grid

Tools

Help

KPIs

Projects

CEO

The Solution Crowd

Dec / Q4 / H2 / Year

2022

Team report

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

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

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

Need help?

10

Yes

Increase

Legend

100%

80-99%

60%

40%

20%

0%

Missing

Not Set



KPIs Report


 Sign out

KPI Report

Period
Dec / Q4 / H2 / Year

Year
2022

[Back](#) [Simple](#) [Detailed](#)

 Sign out

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



KPI Detailed Report (Dec 2022)

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

KPI Lens | CEO

[Annual](#) | [Sub-team KPIs](#) | [Late KPIs](#) | [Red KPIs](#) | [Trending-down KPIs](#) | [Vertical Report](#) | [Drill-down KPIs](#) | [9-Box](#) | [Bell-curve](#) |Late KPIs Report
(CEO - 2025)

KPIs

Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Customers	Increase customer base & products and services	Cost per title	1x	Nauman Khan	Currency	No	Decrease is better	Monthly	-1761.1 0.5	12116.2 1491%	1116.26 1433%	6416.25 837%	64119.45 142%	64120.9 1487%	64122.89 147%	64122 146%	64133 147%	71122 1488%	64144 149%	58151 1497%

Business Support

Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Customers	Increase annual bonuses by 90% for 10% of senior employees	Average Revenue per Customer	1x		USD	Yes	Increase is better	Monthly	119 0.4	11.2 1000%	41.3 1100%	51.4 1120%	51.5 1000%	51.8 100%	51.7 107%	51.4 102%	51.8 104%	6150 105%	1111 110%	1112 110%

Information Technology

No late KPIs

Operations

No late KPIs

Sales

No late KPIs



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KPI Lens | CEO

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

Red KPIs Report
(CEO - Mar - 2025)

KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
Finance	QO	Supplier Cost Savings	1x	Owen Turner	Currency	Yes	Increase is better	Monthly	51.7 (200%)	51.2 (199%)	51.3 (200%)
Customers	Increase customer base & products and services	Offer Acceptance Rate	1x	Hi Jones	%	Yes	Increase is better	Monthly	71.15 (77%)	72.15 (78%)	71.75 (77%)
Customers	Increase customer base & products and services	Recruitment and Selection	2x	Owen Turner	Training and development	Yes	Increase is better	Quarterly	11 (8)	11 (8)	11 (8)
Customers	Increase customer base & products and services	Return on Investment (ROI)	1x	Eari Kane	%	No	Increase is better	Monthly	11.8 (20%)	11.8 (20%)	11.8 (20%)
Internal Process	Build effective organization governance	Revenue Growth Rate- updated	1x	Alan Salmons	%	No	Increase is better	Monthly	11.15 (20%)	11.15 (20%)	11.15 (20%)
Internal Process	Teaching and Learning	Employee compliance rate with governance policies	1x	Alan Salmons	%	No	Increase is better	Monthly	11.15 (20%)	11.15 (20%)	11.15 (20%)
Internal Process	Teaching and Learning	Number of governance training hours per employee	1x	Owen Turner	Hours	No	Increase is better	Monthly	11.8 (20%)	11.8 (20%)	11.8 (20%)

Business Support

KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
Customers	Measuring the training impact on the course	Customer Acquisition Rate	1x	Alan Salmons	Percentage	Yes	Increase is better	Monthly	11.15 (20%)	11.15 (20%)	11.15 (20%)
Customers	Measuring the training impact on the course	New Customers Ratio	1x		Percentage	Yes	Increase is better	Monthly	11.15 (20%)	11.15 (20%)	11.15 (20%)

Information Technology

KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
People	Build a performance driven culture	# of Innovation ideas submitted	1x	Alan Salmons	Idea	Yes	Increase is better	Monthly	11.15 (20%)	11.15 (20%)	11.15 (20%)
People	Optimize capital & operating expenditure	OPEx budget performance	1x	Imran Khan	%	Yes	Decrease is better	Monthly	11.15 (20%)	11.15 (20%)	11.15 (20%)

Operations

KPIs											
------	--	--	--	--	--	--	--	--	--	--	--

KPI Lens | CEO

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

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

KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
Finance	QO	Supplier Cost Savings	1x	Owen Turner	Currency	Yes	Increase is better	Monthly	51.7 (200%)	51.2 (199%)	51.3 (200%)
Customers	Increase customer base & products and services	Offer Acceptance Rate	1x	Hi Jones	%	Yes	Increase is better	Monthly	71.15 (77%)	72.15 (78%)	71.75 (77%)
Internal Process	Build effective organization governance	Customer Lifetime Value (CLV)	1x	Owen Turner	Currency M\$	Yes	Increase is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)
Internal Process	Teaching and Learning	Employee compliance rate with governance policies	1x	Alan Salmons	%	No	Increase is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)
Internal Process	Teaching and Learning	Number of governance training hours per employee	1x	Owen Turner	Hours	No	Increase is better	Monthly	11.8 (20%)	11.8 (20%)	11.8 (20%)

Business Support

KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
Customers	Increase annual bonuses by 80% for 10% of sector employees	Revenue Growth Rate	1x	Alan Salmons	%	No	Increase is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)

Information Technology

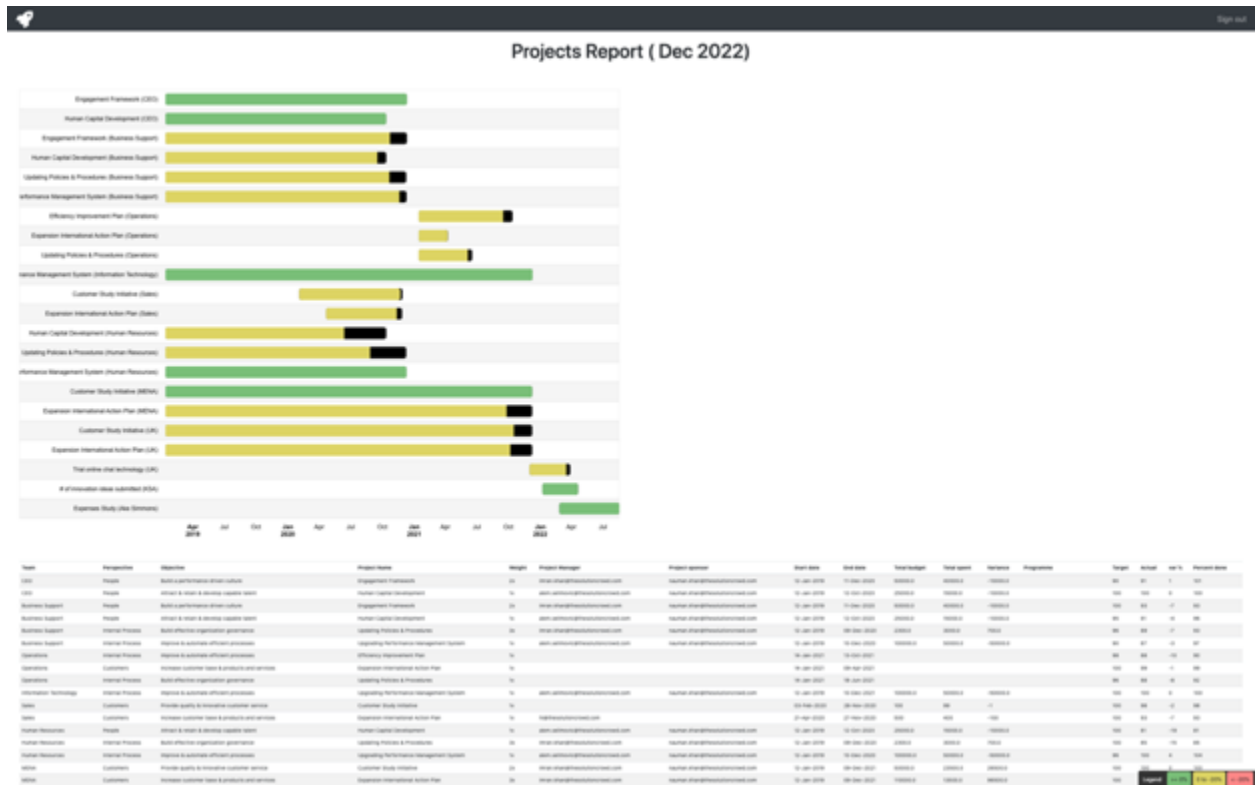
KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
Internal Process	Improve & automate efficient processes	% of IT Service tickets closed on time	1x	Imran Khan	%	Yes	Increase is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)
People	Optimize capital & operating expenditure	OPEx budget performance	1x	Imran Khan	%	Yes	Decrease is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)

Operations

KPIs											
Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar
Internal Process	Build effective organization governance	Timely closure of audit observations	1x	Alan Salmons	%	Yes	Increase is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)
People	Build a performance driven culture	Average employee satisfaction rating	1x	Eari Kane	%	Yes	Increase is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)
People	Optimize capital & operating expenditure	OPEx budget performance	1x	Imran Khan	%	Yes	Decrease is better	Monthly	11.15 (200%)	11.15 (200%)	11.15 (200%)

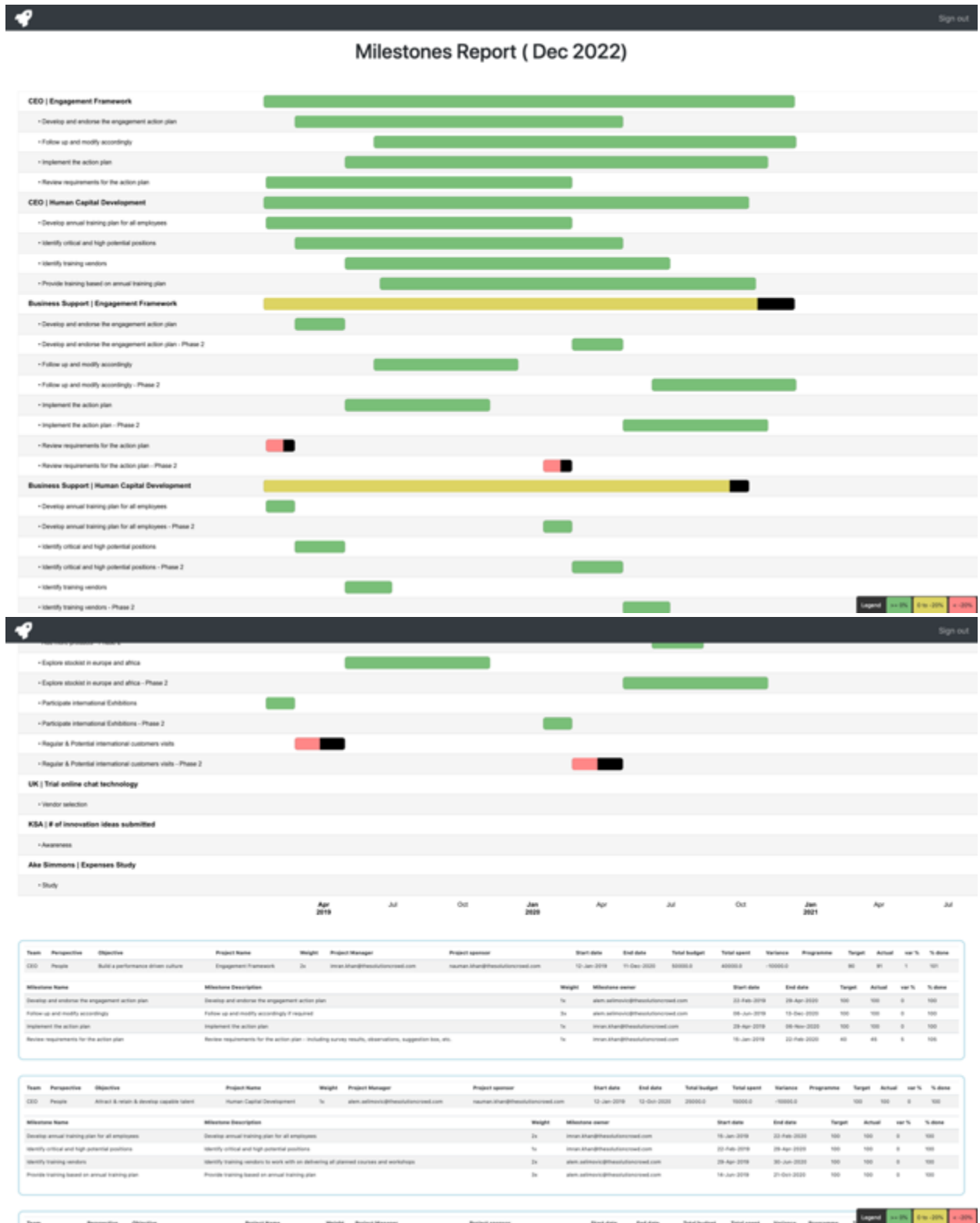


Projects report






Milestones Report





Users reports



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User Report

Kippy Users (16)


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

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Details

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































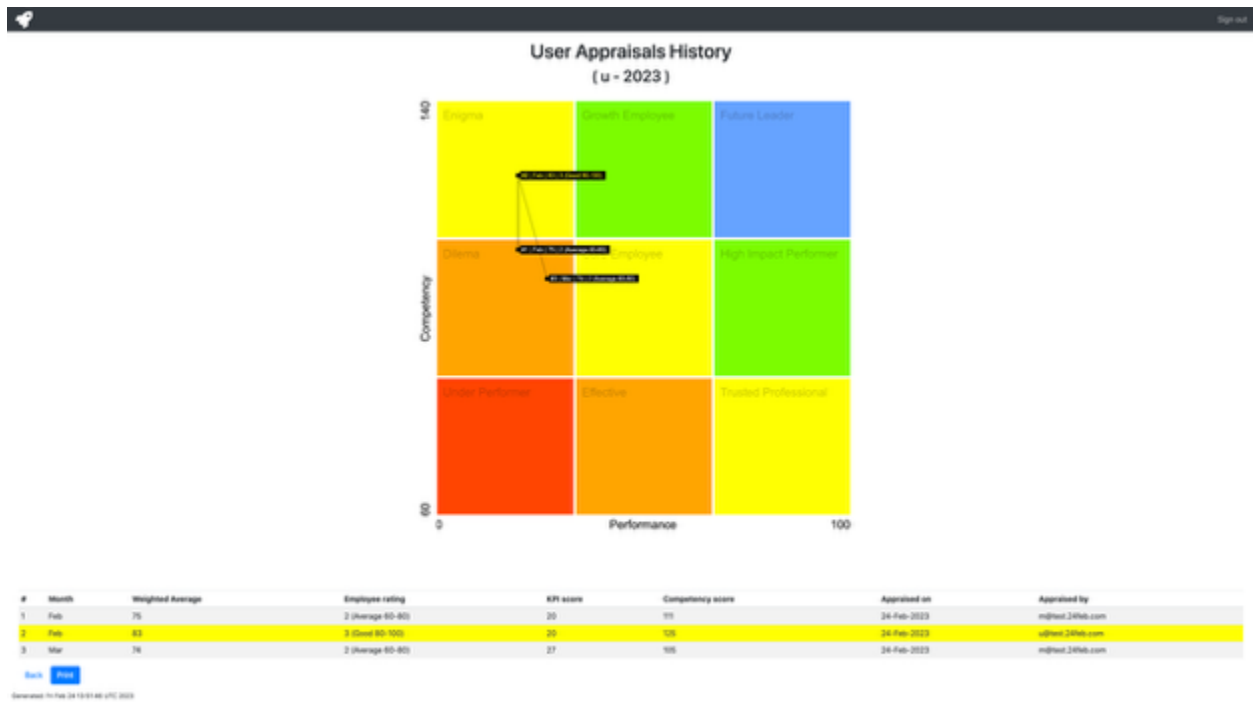
Sign out


[Sign out](#)

User Report

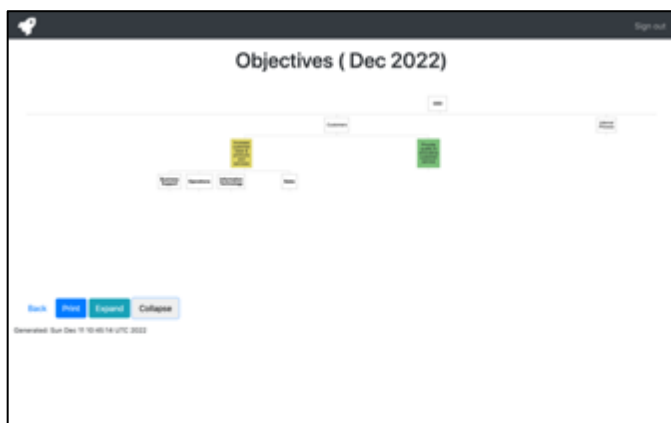
Kippy Users (16)

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



[illegible]

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





Org reports

Sign out

Org Report

Kippy Teams (12)

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

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Sign out

Org Report

Kippy Teams Details (12)

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

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Annual reports

See annual view per user/team KPIs and projects.



Sign out

Team Report
(CEO - 2023)

KPIs

Perspective	Objective	KPI Name	Weight	Owner	Unit	Cumulative	Direction	Frequency	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Build a performance driven culture	# of innovation ideas submitted	1x	Alem Selimovic	Idea	Yes	Increase is better	Monthly	5 7 (500%)	5 7 (500%)	5 7 (500%)	5 7 (500%)	5 2 (250%)	5 2 (250%)	5 2 (250%)	5 2 (250%)	6 5 (120%)	6 5 (120%)	6 5 (120%)	16 9 (167%)
Internal Process	Improve & automate efficient processes	# of key business processes improved and/or automated	1x	Imran Khan	Bus. Process	Yes	Increase is better	Monthly	- 1 (-)	- 2 (-)	1 3 (33%)	1 5 (20%)	1 5 (20%)	- 5 (-)	2 6 (33%)	2 6 (33%)	2 6 (33%)	- 6 (-)	3 8 (37%)	3 10 (30%)
Customers	Increase customer base & products and services	# of new product introduced	3x	Nauman Khan	Product	Yes	Increase is better	Monthly	3 7 (300%)	1 7 (100%)	1 7 (100%)	2 7 (200%)	2 2 (100%)	2 2 (100%)	2 2 (100%)	2 2 (100%)	2 3 (67%)	2 3 (67%)	3 3 (100%)	4 3 (133%)
People	Build a performance driven culture	# projects started	2x	Mike Boemi	Unit	Yes	Increase is better	Monthly	1 5 (20%)	1 5 (20%)	1 5 (20%)	2 6 (25%)	3 6 (37%)	3 6 (37%)	3 9 (33%)	5 9 (56%)	5 9 (56%)	5 10 (50%)	9 10 (90%)	10 10 (100%)
Customers	Provide quality & innovative customer service	% Customers satisfaction	2x	Imran Khan	%	Yes	Increase is better	Semi-annual	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	60 70 (84%)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	90 85 (104%)
People	Attract retain & develop capable talent	% Employees Turnover	1x	Imran Khan	%	Yes	Decrease is better	Semi-annual	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	5 15 (300%)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	15 15 (100%)
Internal Process	Improve & automate efficient processes	% of IT Service tickets closed on time	1x	Imran Khan	%	Yes	Increase is better	Monthly	30 90 (33%)	40 90 (44%)	50 90 (56%)	60 90 (67%)	60 90 (67%)	60 90 (67%)	60 95 (63%)	60 95 (63%)	60 95 (63%)	70 95 (74%)	- 95 (-)	100 95 (105%)
Customers	Increase customer base & products and services	% of customer left and services	2x	Nauman Khan		Yes	Decrease is better	Monthly	10 77 (110%)	11 75 (136%)	11 76 (148%)	11 77 (155%)	11 78 (164%)	12 20 (167%)	16 20 (187%)	16 21 (184%)	16 22 (200%)	18 23 (183%)	19 25 (184%)	20 25 (175%)
Finance	Optimize capital & operating expenditure	Average cost per FTE	1x	Alem Selimovic	Mill. USD	Yes	Decrease is better	Yearly	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	1.79 2.5 (142%)
People	Build a performance driven culture	Average employee satisfaction rating	1x	Alem Selimovic	%	No	Increase is better	Yearly	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	- - (-)	65 75 (67%)
People	Attract retain & develop capable talent	Average training hours per FTE	1x	Imran Khan	Hour	Yes	Increase is better	Monthly	5 5 (100%)	5 5 (100%)	5 5 (100%)	- 10 (-)	5 10 (50%)	6 10 (60%)	6 10 (60%)	6 10 (60%)	6 15 (40%)	8 15 (53%)	10 15 (67%)	10 15 (67%)
Customers	Increase customer base & products	Awareness has	1x	Carl Kane	new	Yes	Increase is better	Quarterly	- - (-)	- - (-)	60 80 (-)	- - (-)	- - (-)	65 90 (-)	- - (-)	- - (-)	70 95 (-)	- - (-)	- - (-)	75 100 (-)



Sign out

Projects and milestones

Engagement Framework

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

Human Capital Development

Perspective	Objective	Project Name	Project Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Attract retain & develop capable talent	Human Capital Development	1x	Alem Selimovic	Nauman Khan	12-Jan-2019	12-Oct-2020	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)
Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Develop annual training plan for all employees	2x	Imran Khan	15-Jan-2019	22-Feb-2020	25 / 50 (75%)	90 / 100 (90%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	
Identify critical and high potential positions	1x	Imran Khan	22-Feb-2019	29-Apr-2020	10 / 0 (110%)	25 / 25 (100%)	60 / 50 (110%)	70 / 100 (70%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	
Identify training vendors	2x	Alem Selimovic	29-Apr-2019	30-Jun-2020	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	10 / 25 (85%)	80 / 80 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	
Provide training based on annual training plan	3x	Alem Selimovic	14-Jun-2019	21-Oct-2020	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	0 / 0 (100%)	5 / 0 (105%)	15 / 10 (150%)	60 / 50 (120%)	80 / 60 (130%)	100 / 70 (140%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	

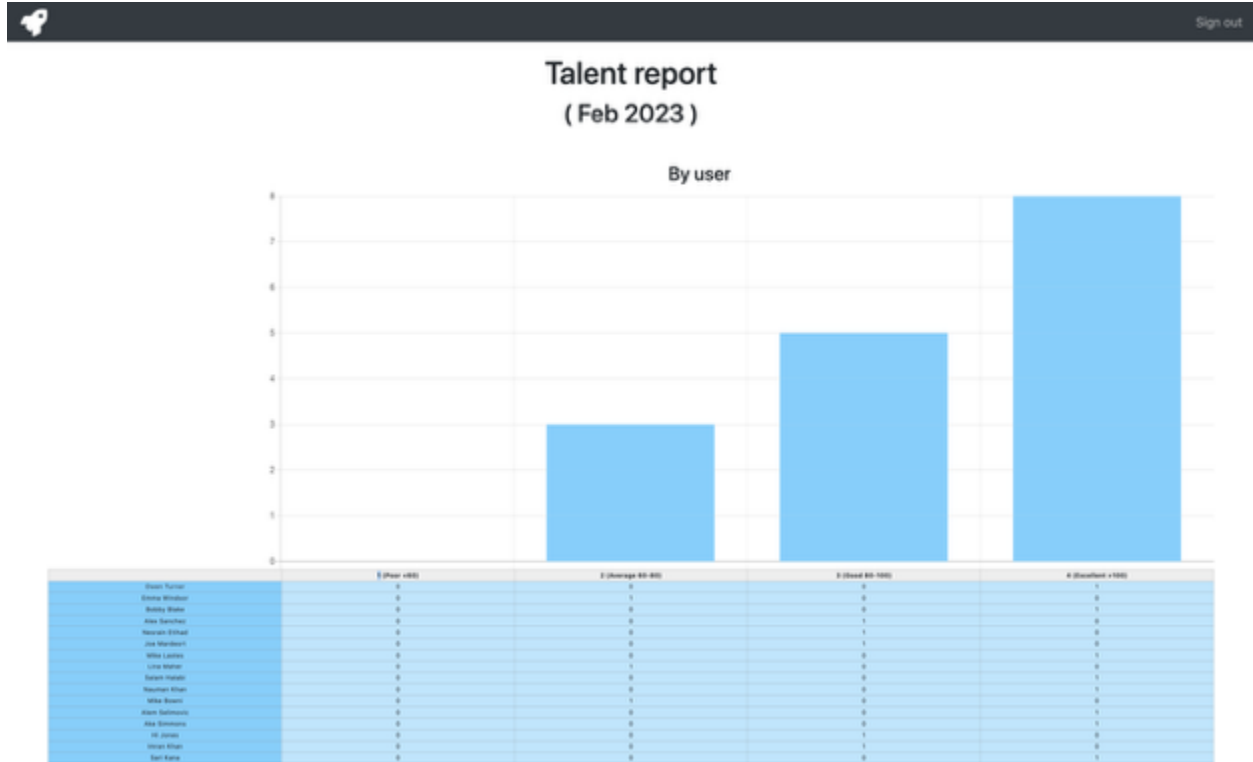
Sign out

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

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

Talent reports

See talent grouped by ratings – all fully configurable.

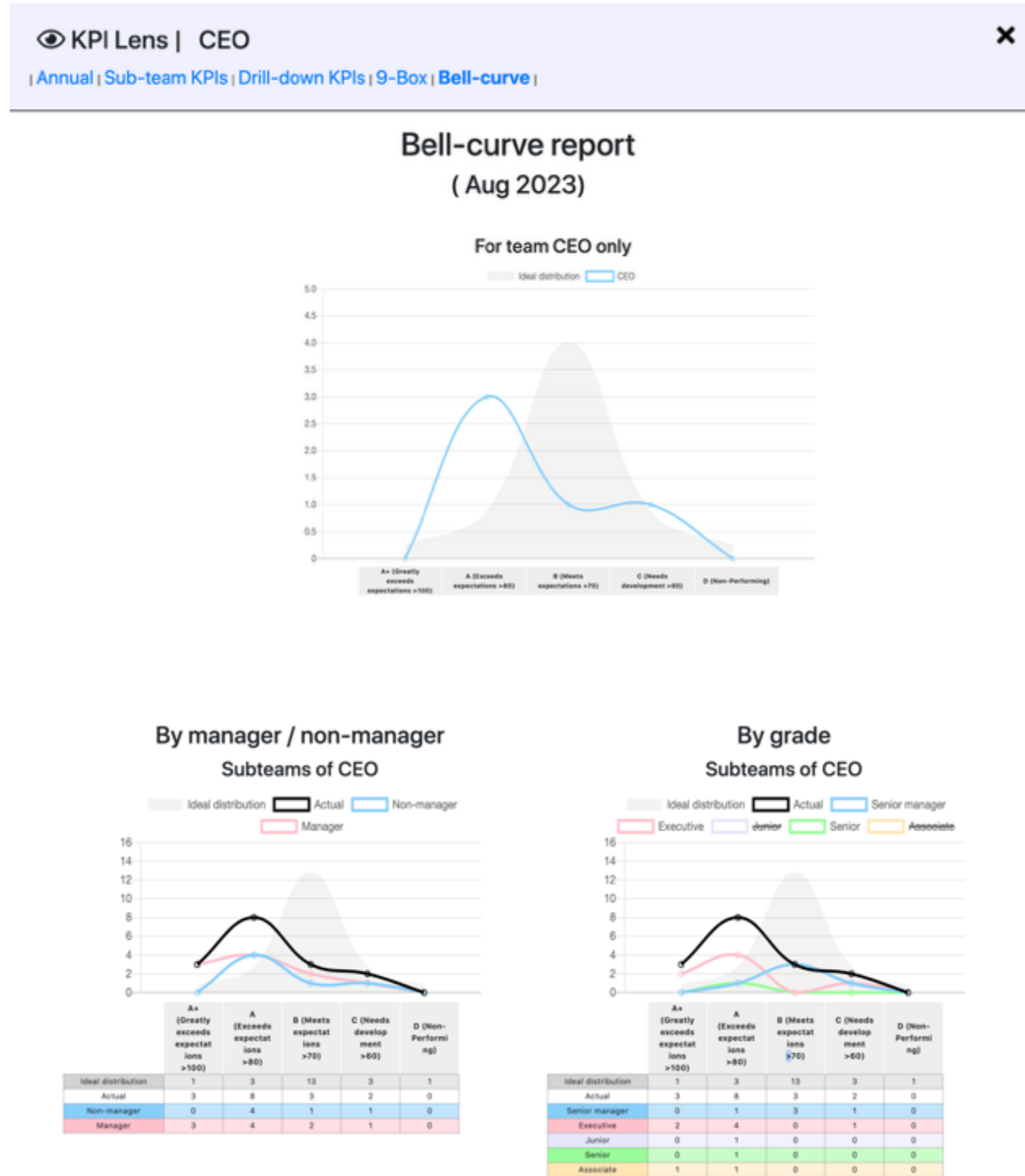


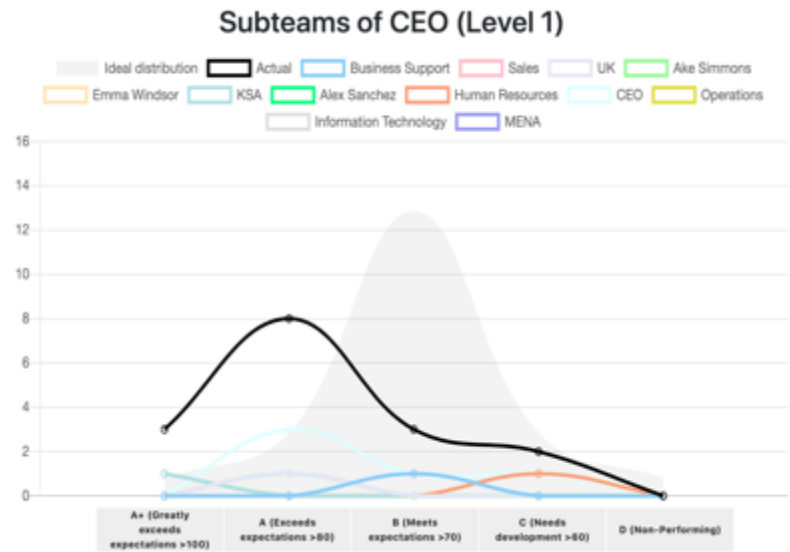
By various dimensions.



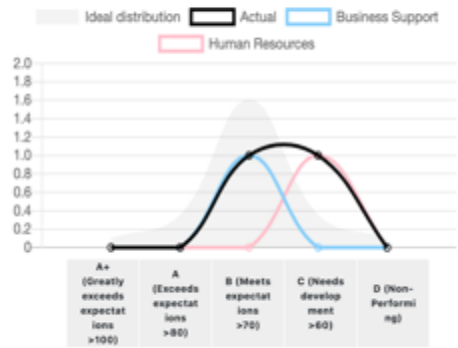
Bell-curves

See appraisals grouped on bell-curves.

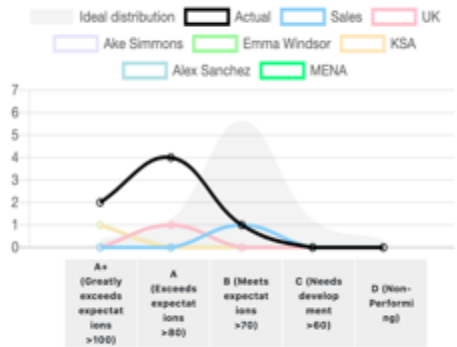




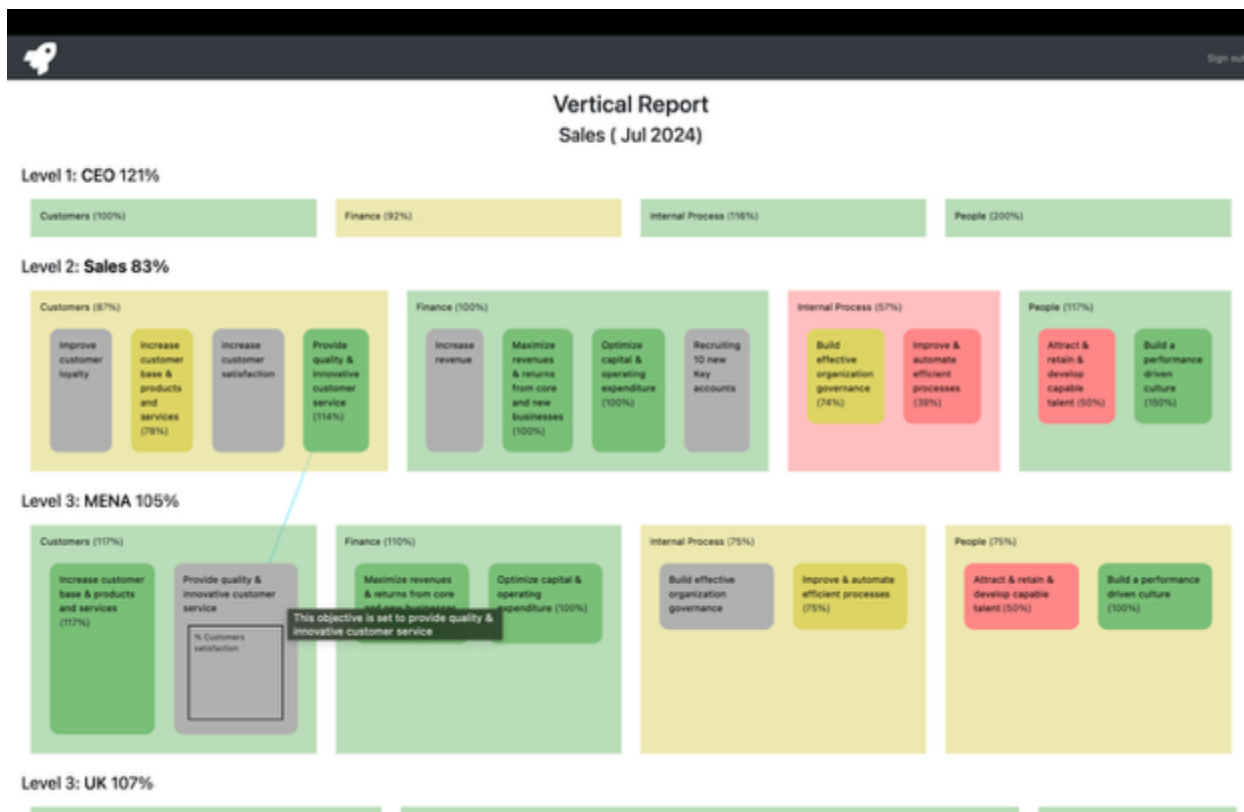
Subteams of Business Support (Level 2)



Subteams of Sales (Level 2)



Vertical reports



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

Scheduled reports

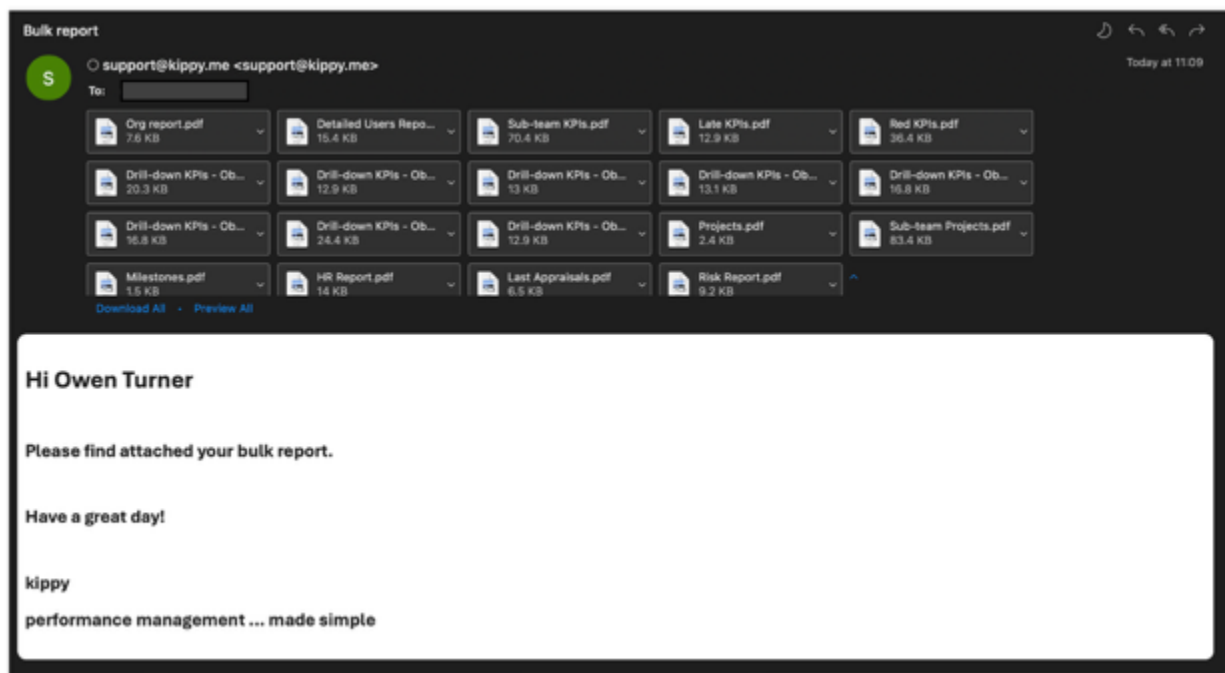
Profile details

Name	Owen Turner
Grade	Executive
Designation	Founder
Tree Depth	One level down
Email Bulk Report (days of the month)	Nothing selected
Email Bulk Report (days of week)	Monday, Thursday
Email Previous Bulk Report (days of the month)	7
Email Bulk Report (include)	KPI reports, Drill down reports, Project reports, HR reports

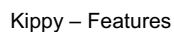
Silent mode? ☐

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

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



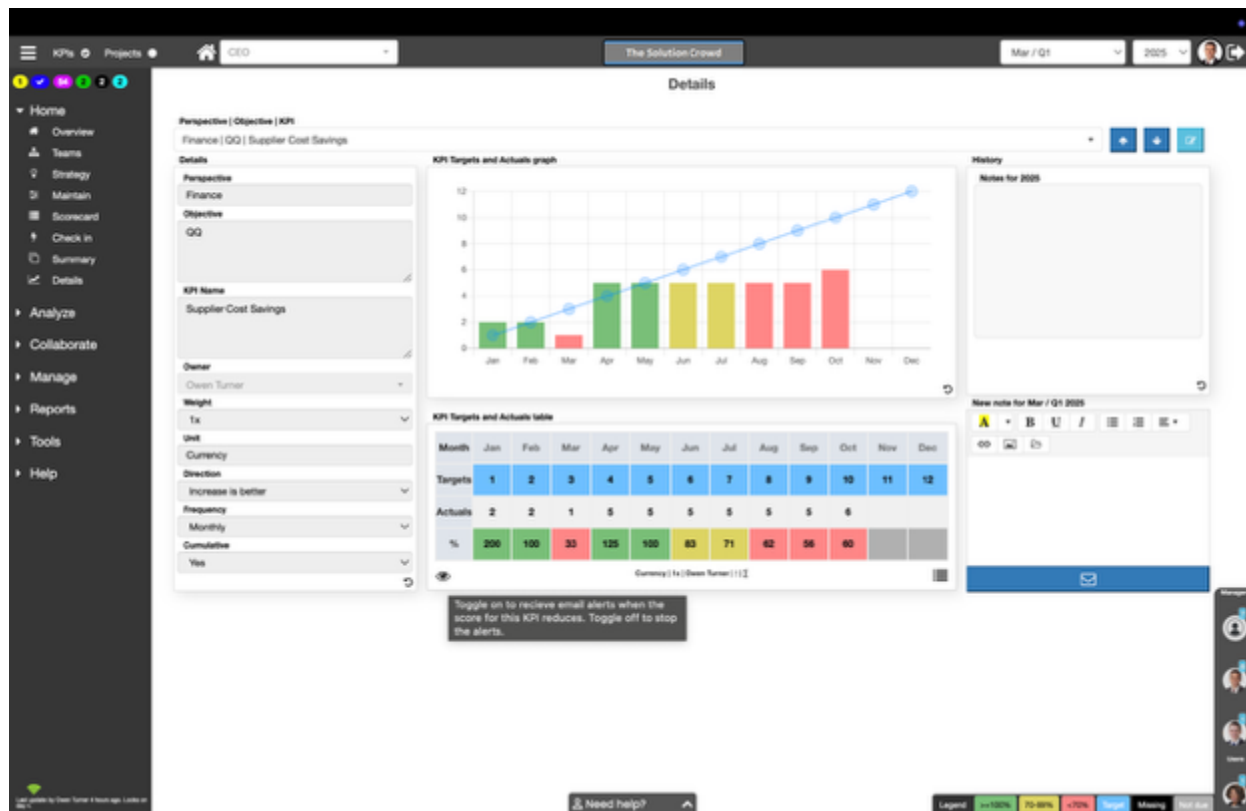
Reports which include visuals can also be sent in PDF and Powerpoint format. See PDFShift Integration in Tools | Settings.



99

Watch List

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



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



Watch list


S

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

To: nmannkhan@gmail.com

Today at 11:27

Watch List



The scores for the following KPIs has decreased

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

Log in

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

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




Risk Management

Risk Report

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

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



Sign out

Risk Report (Jun 2022)

Team-level risks

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

1

Project-level risks

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

Task-level risks

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

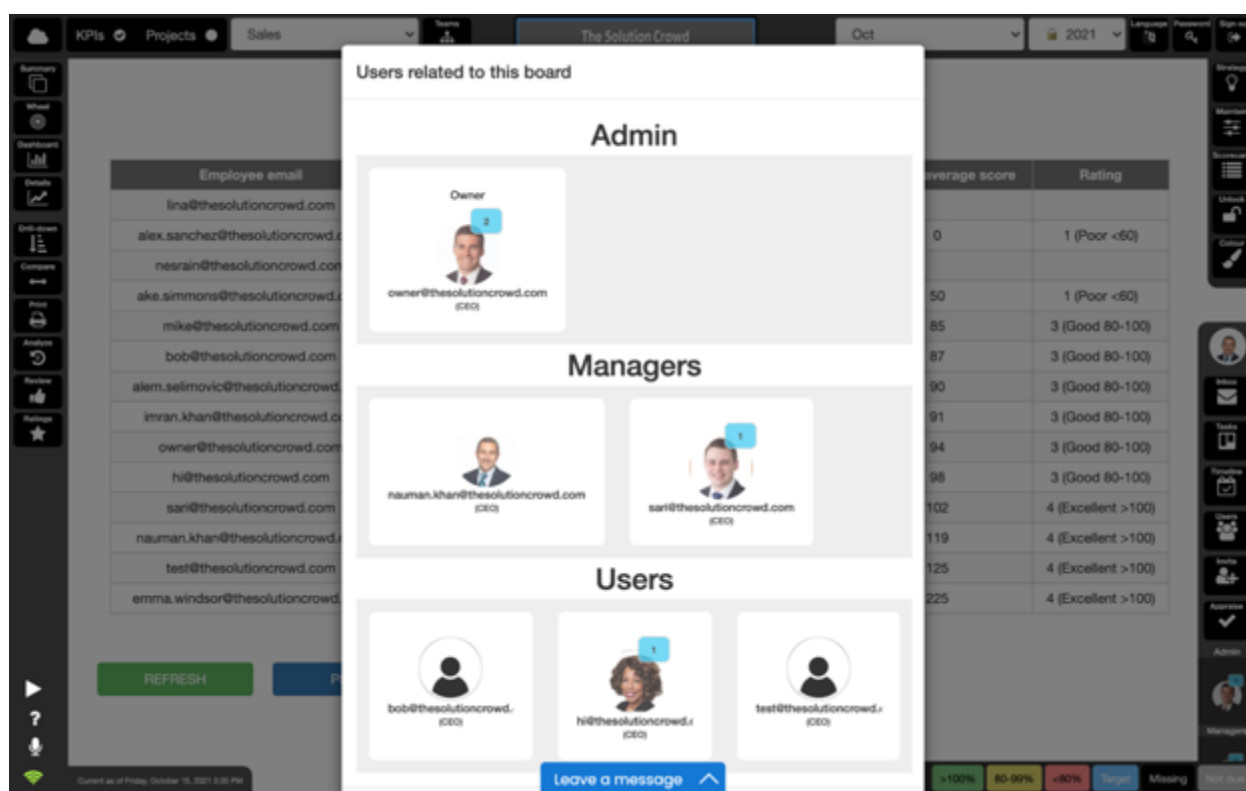
Generated: Mon Jun 20 10:33:12 UTC 2022

Governance

All this is controlled with automated governance.

Roles

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



Managers have additional screen to perform HR functions.

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

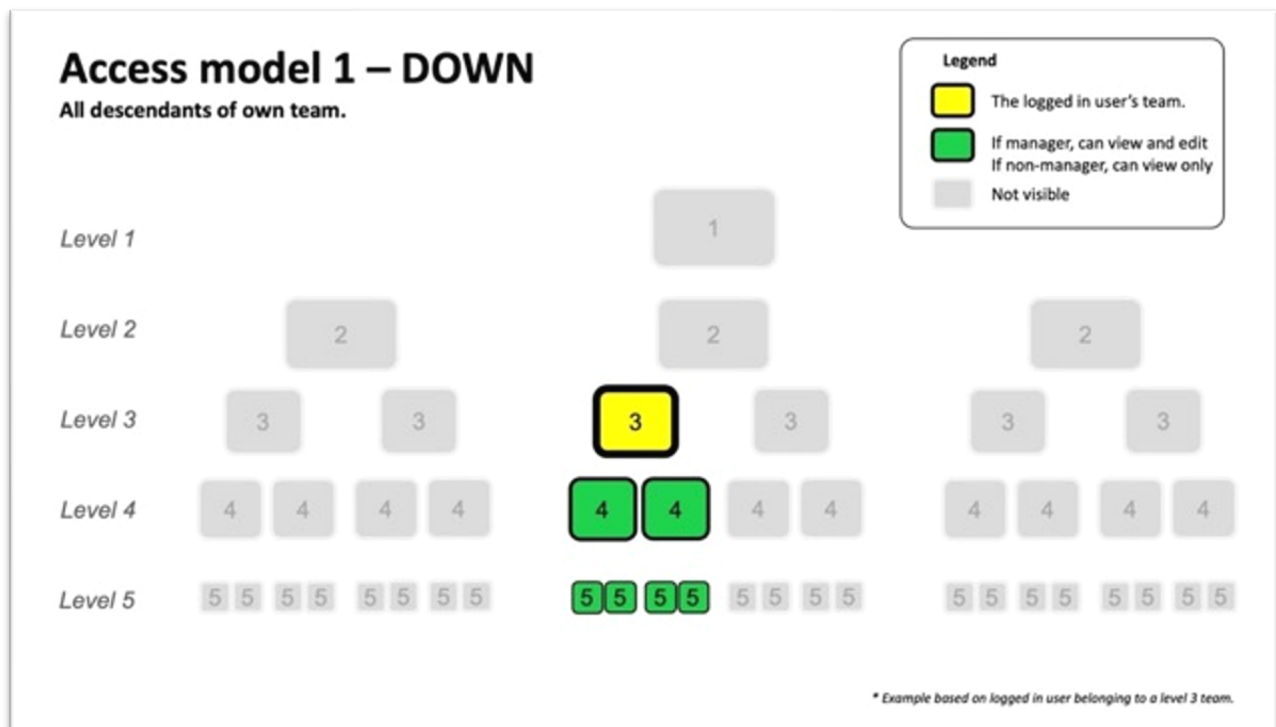
Team visibility model

Access mode

DOWN: All descendants of own team.

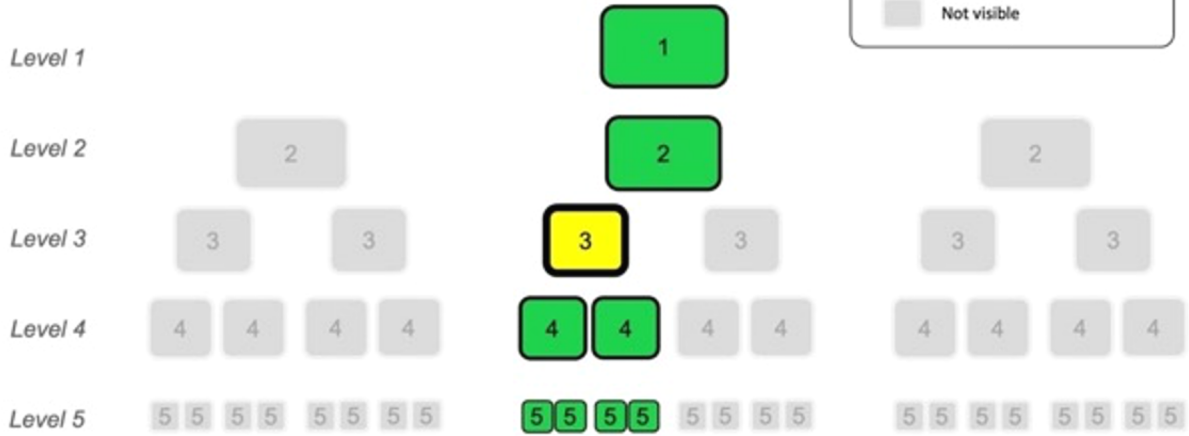
SAVE ACCESS MODE

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



Access model 2 – UP-DOWN

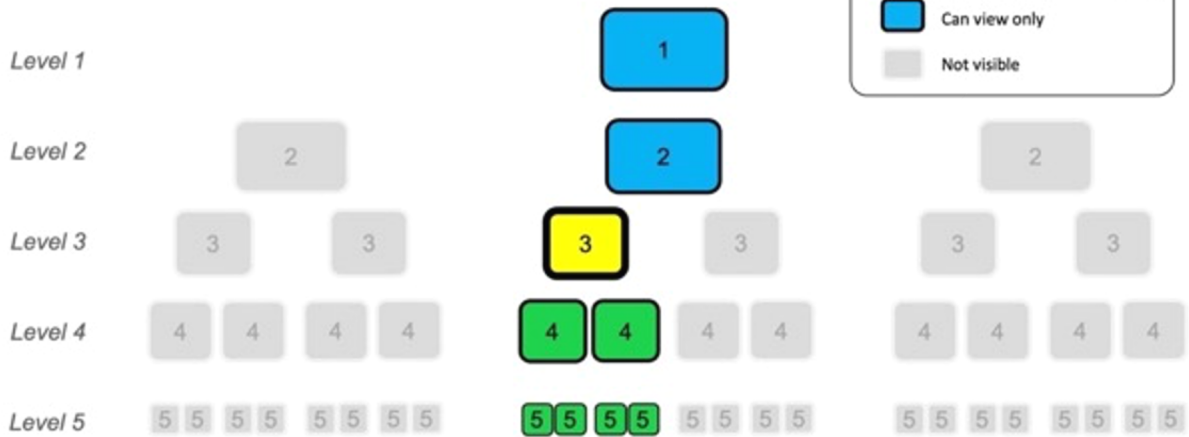
All descendants of own team. Plus, direct ancestors of own team, and managers can edit those ancestors.



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

Access model 3 – UP-DOWN RESTRICTED

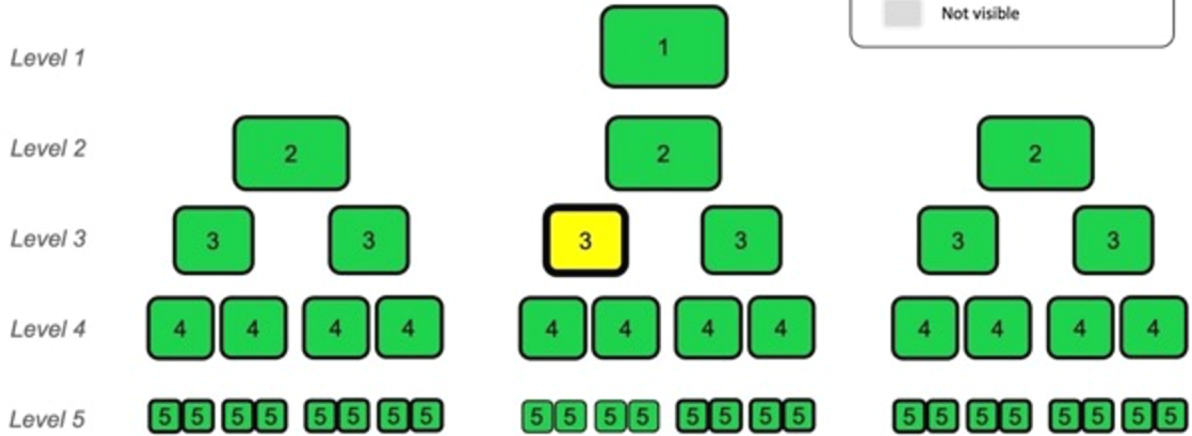
All descendants of own team. Plus, direct ancestors of own team, but managers can not edit those ancestors.



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

Access model 4 – FULL

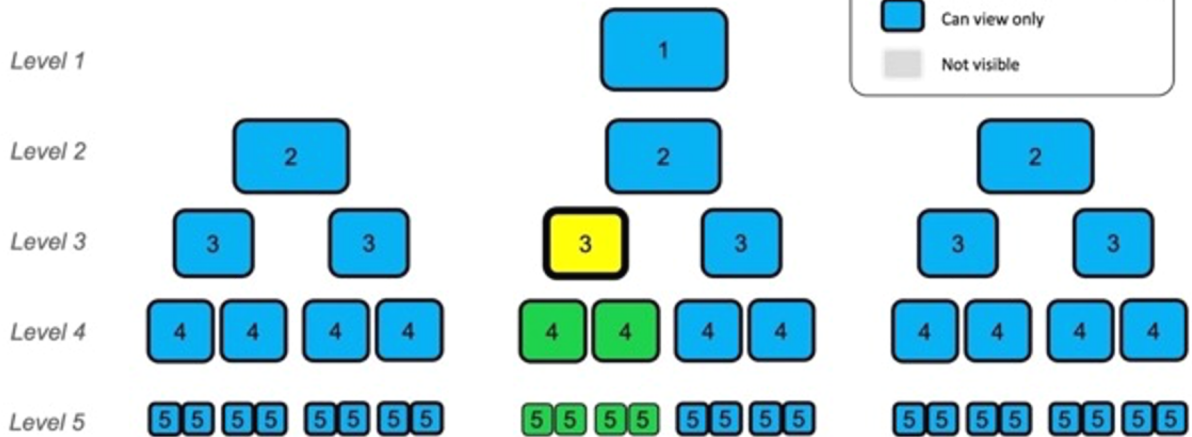
All teams, anywhere in the organisation. Managers can edit any team.



* 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.



Cross-functional teams

Roles and permissions are hierarchical by default but can be overloaded to give a user access to teams outside of their hierarchy by assigning them 'additionalTeams'.

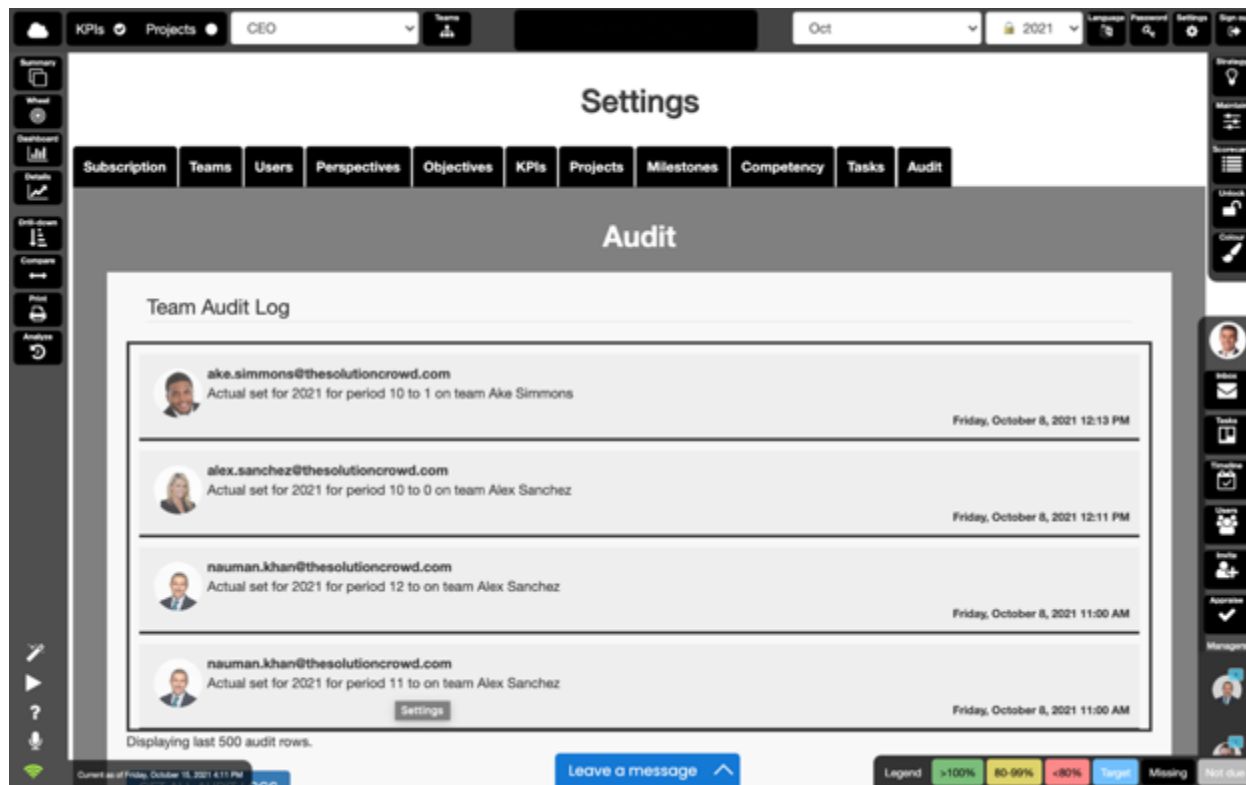
A manager can also be marked as the primary manager for a team. This helps e.g. when a team has many managers, or a sub-team manager has temporary responsibilities for also managing the department.

See <https://www.kippy.cloud/user-roles> for more info.

Auditing

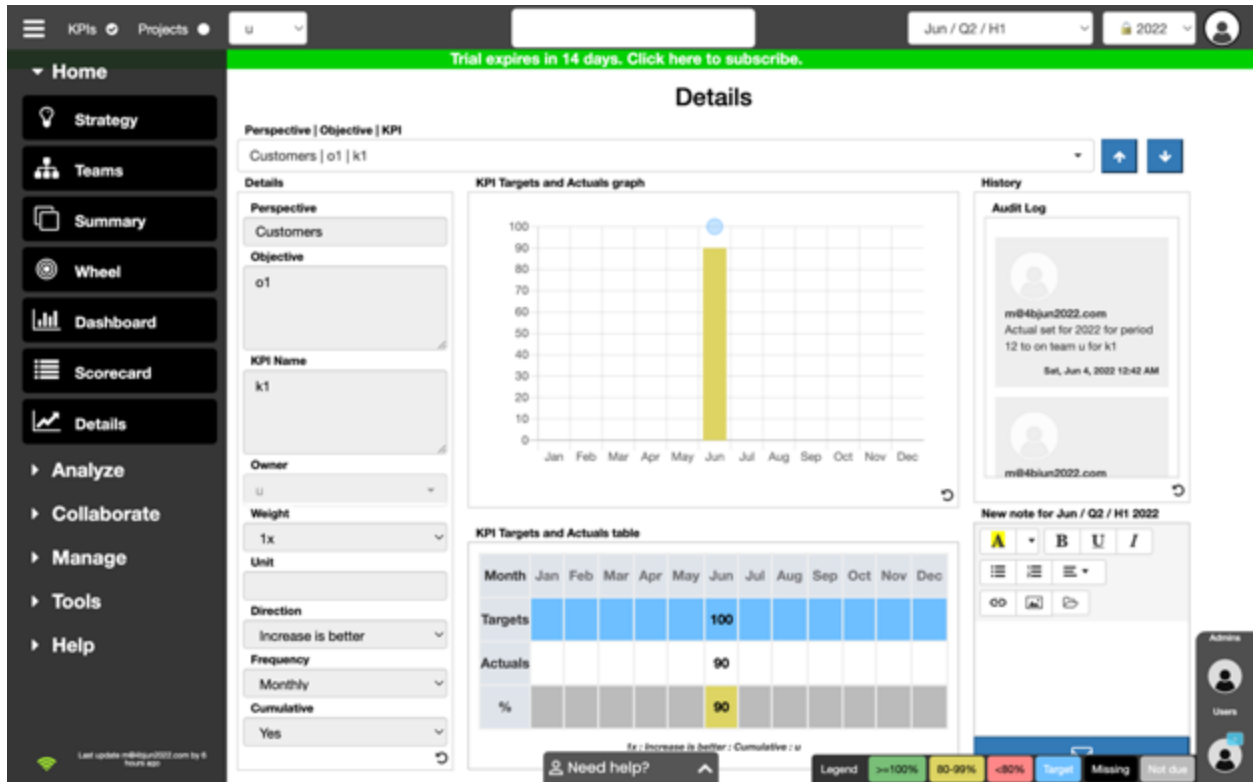
Every change is automatically audited in an immutable log.

System owners can review the system-wide audit log.







An audit log of all changes with audit reports including:

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





History	
Audit Log	
	<div>nauman.khan@thesolutioncrowd.com Task deleted for 2021 period 2 on team CEO for Awareness has spread Saturday, September 25, 2021 4:33 PM</div>
	<div>nauman.khan@thesolutioncrowd.com Task added for 2021 period 9 on team CEO for Awareness has spread Saturday, September 25, 2021 4:33 PM</div>
	<div>nauman.khan@thesolutioncrowd.com Task deleted for 2021 period 2 on team CEO for Awareness has spread Thursday, August 12, 2021 8:22 AM</div>
	

Every appraisal is logged.



Kippy – Features

The screenshot displays the Kippy web application interface. The top navigation bar includes a menu icon, 'KPIs', 'Projects', a search bar, and a user profile icon. A green banner at the top right states 'Trial expires in 14 days. Click here to subscribe.' with 'CANCEL' and 'SAVE COMPETENCIES' buttons. The left sidebar contains a 'Collaborate' section with 'Inbox', 'Tasks', 'Timeline', 'Users', 'Invite', and 'Appraisals' (checked). Below this is a 'Manage' section with 'Tools' and 'Help'. The main content area shows the 'Appraisals' view for the year 2022. It features an 'Audit Log' with two entries from 'm@4bjun2022.com' dated 'Sat, Jun 4, 2022 7:33 AM'. Each entry provides a detailed appraisal summary, including a Competency score of 100%, a weighted score of 96, a rating of 3 (Good 80-100), and feedback scores for various categories. A tooltip for the 'Appraisals' link explains its function: 'Appraisals - View a user's feedback and performance across KPIs, Projects and Milestones. Provide general feedback and rate against core competencies.' The bottom of the interface includes a 'KPI Graphs' section, a 'Need help?' button, and a legend for performance levels: >=100% (green), 80-99% (yellow), <80% (red), Target (blue), Missing (grey), and Not due (grey).

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

✕

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

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

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

Change log report

A primary manager also has access to a report of key actions, which highlights only the pertinent activities under taken in their team and sub-teams. This is automatically emailed to the primary manager every night.

Change Log Report for Owen Turner (owner@thesolutioncrowd.com) (Oct 2025)

On	By	Team	Item	Message
02-Oct-2025 09:02:05	owner@thesolutioncrowd.com	CEO	Supplier Cost Savings	Actual set for 2025 for period 9 to 25

[Print](#) [Previous month](#) [Next month](#) [Download](#)

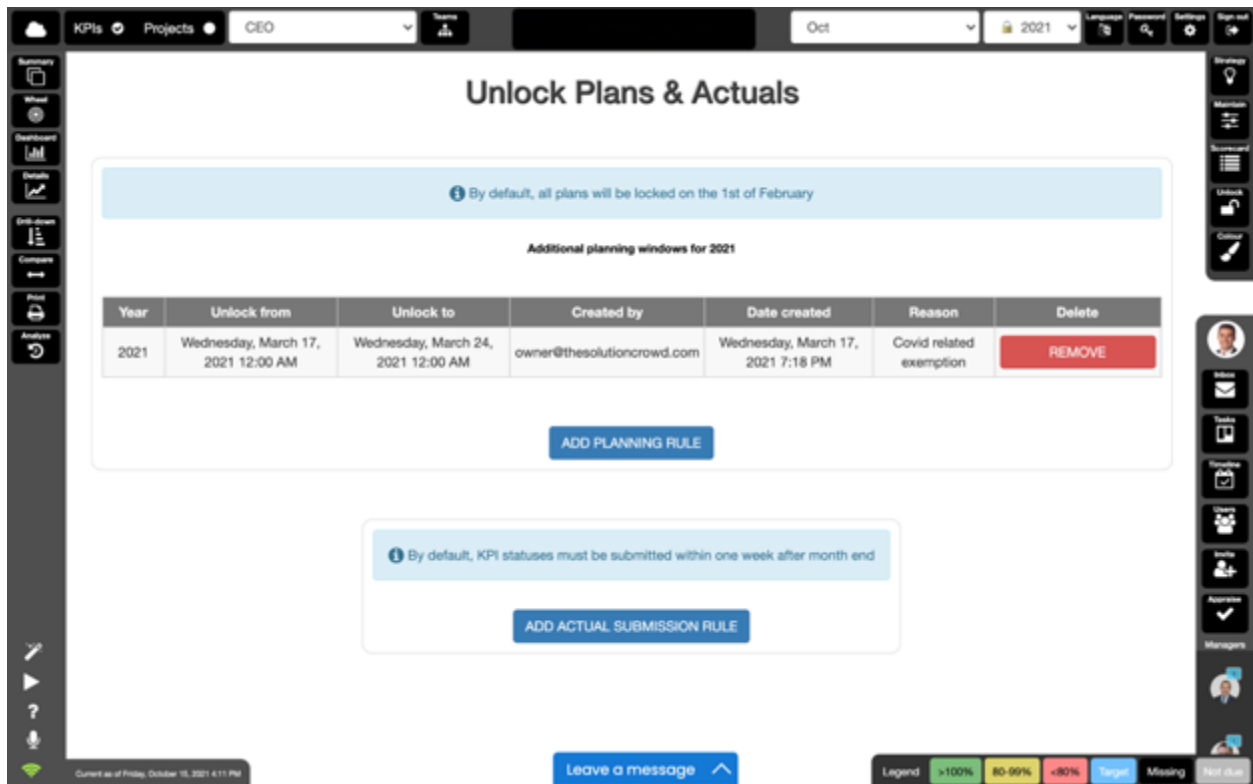
Generated: Fri Oct 03 11:30:17 UTC 2025



Change freezes

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

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



Unlock Plans & Actuals

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

Additional planning windows for 2021

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

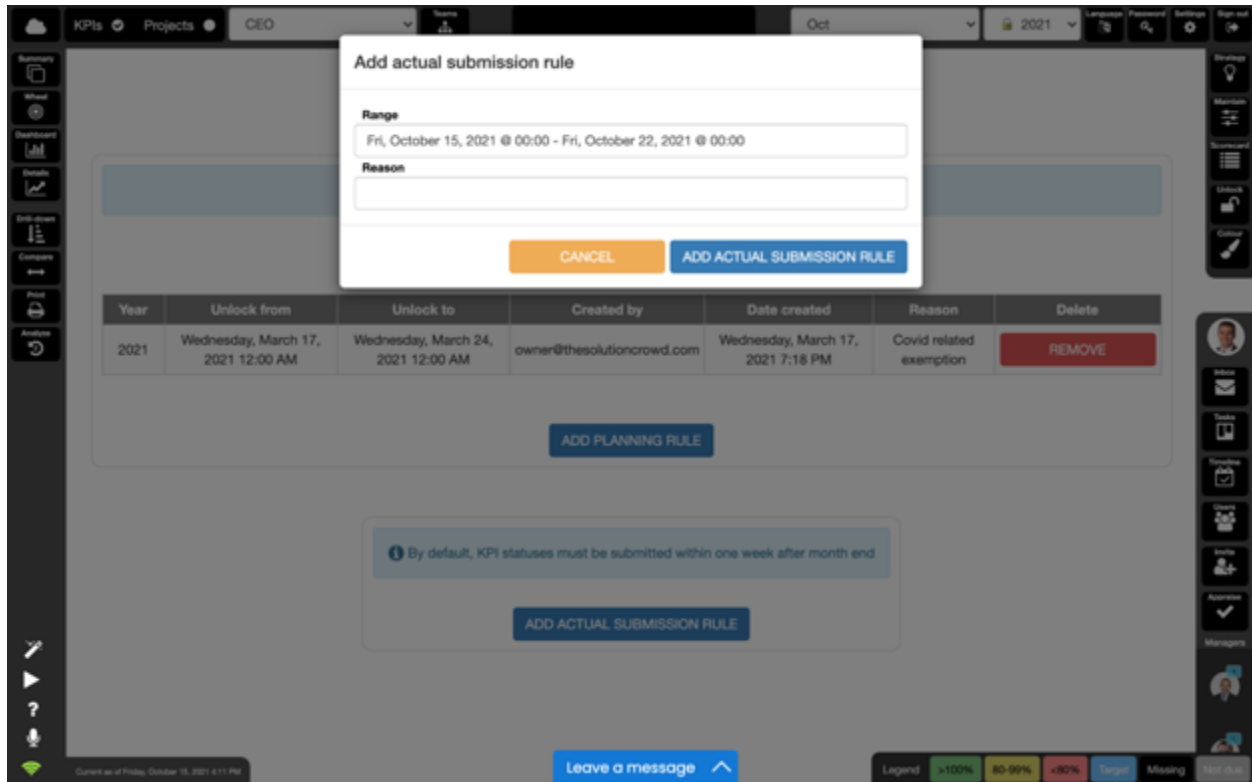
ADD PLANNING RULE

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

ADD ACTUAL SUBMISSION RULE

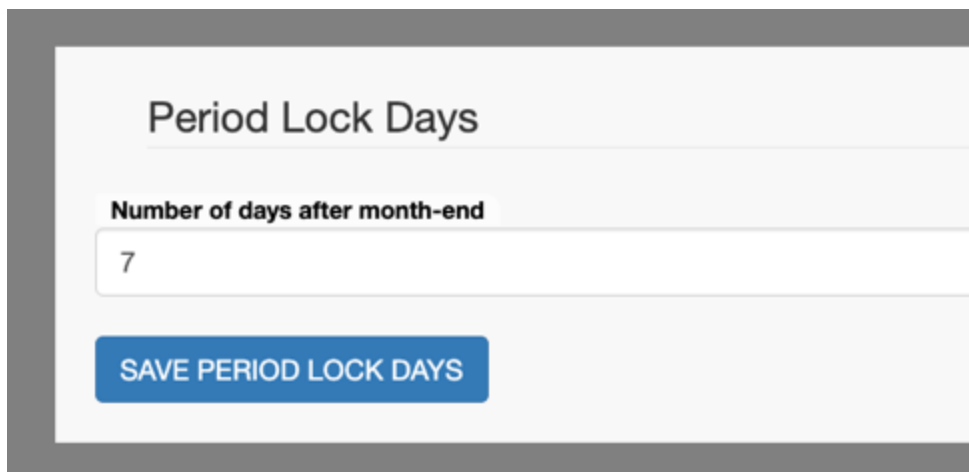
Leave a message

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



The screenshot shows the Kippy dashboard interface. A modal titled "Add actual submission rule" is open, allowing users to define a range and reason for a submission rule. Below the modal, a table lists existing submission rules. The table has columns for Year, Unlock from, Unlock to, Created by, Date created, Reason, and a Delete button. A "REMOVE" button is visible next to the first rule. Below the table, there are buttons for "ADD PLANNING RULE" and "ADD ACTUAL SUBMISSION RULE". A notification box states: "By default, KPI statuses must be submitted within one week after month end". At the bottom, there is a "Leave a message" button and a legend for KPI statuses.

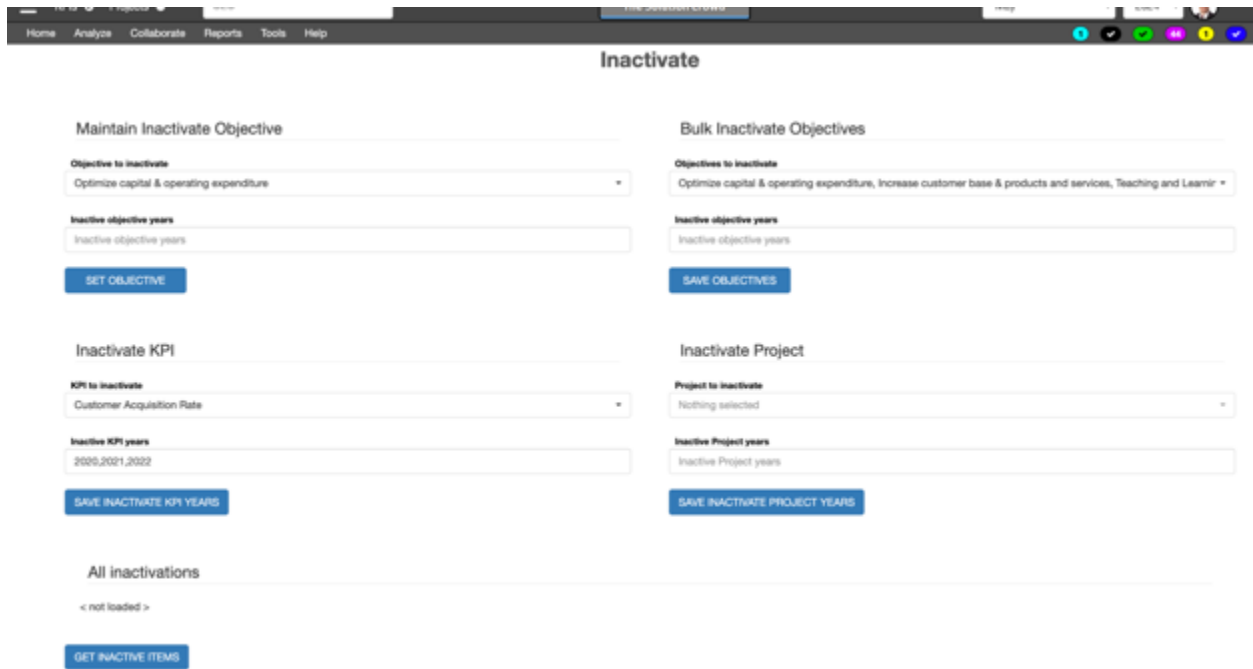
Year	Unlock from	Unlock to	Created by	Date created	Reason	Delete
2021	Wednesday, March 17, 2021 12:00 AM	Wednesday, March 24, 2021 12:00 AM	owner@thesolutioncrowd.com	Wednesday, March 17, 2021 7:18 PM	Covid related exemption	REMOVE



The screenshot shows a form titled "Period Lock Days". It contains a label "Number of days after month-end" and a text input field with the value "7". Below the input field is a blue button labeled "SAVE PERIOD LOCK DAYS".

Inactivations

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



The screenshot shows the 'Inactivate' interface in the Kippy application. The interface is divided into four main sections for inactivating different types of metrics:

- Maintain Inactivate Objective:** Includes a dropdown for 'Objective to Inactivate' (currently 'Optimize capital & operating expenditure'), a text input for 'Inactive objective years', and a 'SET OBJECTIVE' button.
- Bulk Inactivate Objectives:** Includes a dropdown for 'Objectives to Inactivate' (currently 'Optimize capital & operating expenditure, Increase customer base & products and services, Teaching and Learning'), a text input for 'Inactive objective years', and a 'SAVE OBJECTIVES' button.
- Inactivate KPI:** Includes a dropdown for 'KPI to Inactivate' (currently 'Customer Acquisition Rate'), a text input for 'Inactive KPI years' (currently '2020,2021,2022'), and a 'SAVE INACTIVATE KPI YEARS' button.
- Inactivate Project:** Includes a dropdown for 'Project to Inactivate' (currently 'Nothing selected'), a text input for 'Inactive Project years', and a 'SAVE INACTIVATE PROJECT YEARS' button.

At the bottom, there is a section for 'All Inactivations' with a '< not loaded >' message and a 'GET INACTIVE ITEMS' button.

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

Quick set-up

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

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

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

Quick Set

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

SAVE

CANCEL

ADD ROW

Need help?



☰

KPIs Projects CEO

The Solution Crowd

Feb 2024

Home Analyze Collaborate Reports Tools Help

87 unapproved KPIs 2 self-appraisals to review

Settings

Setup Config Subscription Teams Users Perspectives Objectives KPI Projects Milestones Competency Tasks Audit Integrations Reports

Setup

Import team

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

Please upload a **kippy template**

Choose file

No file chosen

UPLOAD

Set up mode

Unlock all planning and actual submissions

☐ OFF

Show quickset up for managers

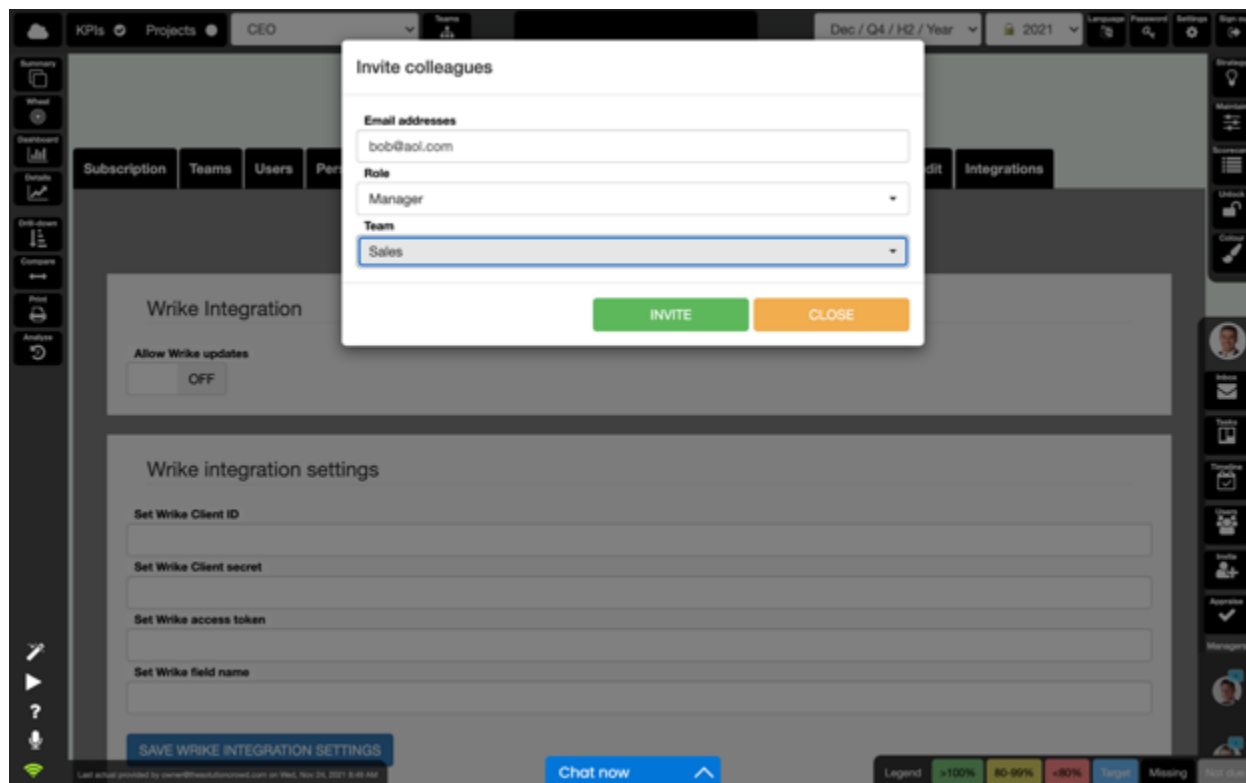
☒ ON

Need help?

User management

Simple in-app management

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



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


Users can be added with alias email addresses, as silent (so not receive any email notifications) , as unlicensed users (who can be managed in the system but not login themselves) and hidden (so that they do not appear in reports e.g. for admin and system-to-system users).

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

Other meta-data can also be stored about users including grades, designations, employee ID and additional information.



View all users in one report.

Sign out

User Report

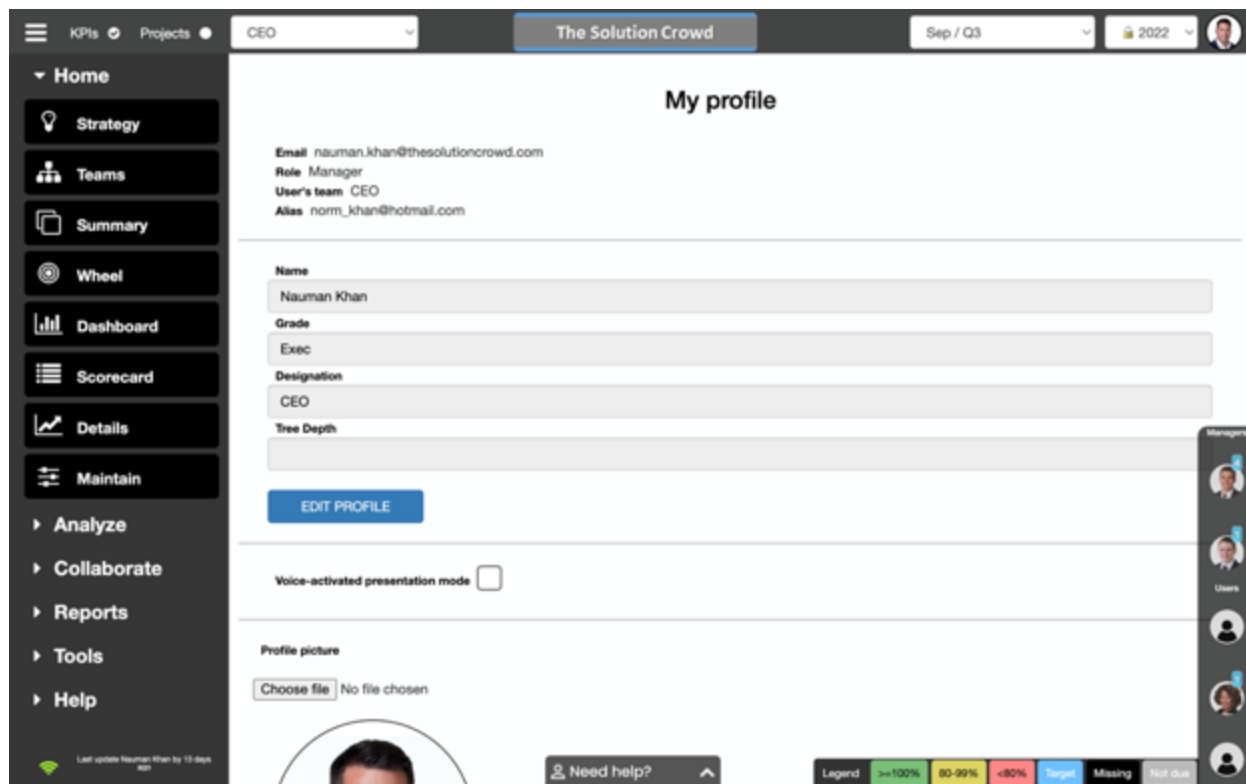
Kippy Users (15)

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 Mandesrt	joe@thesolutioncrowd.com	User	No	CEO				

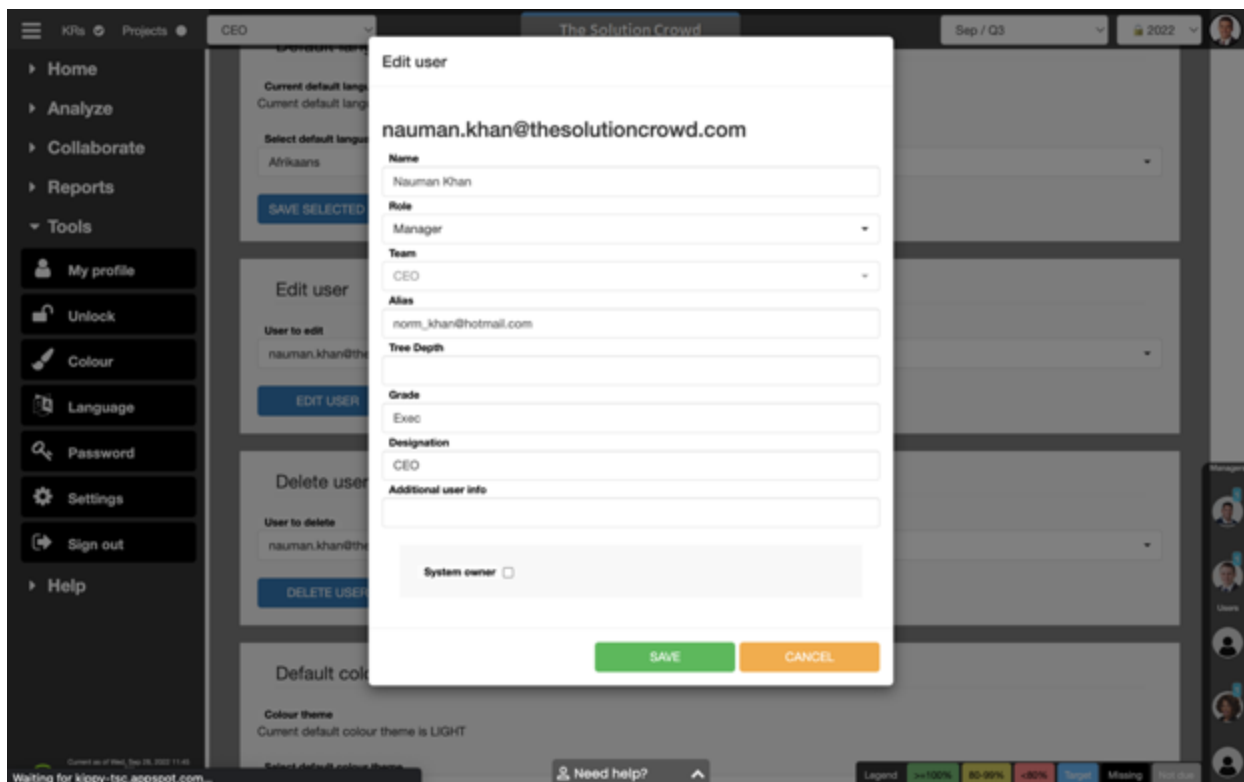
[Back](#) [Print](#)

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

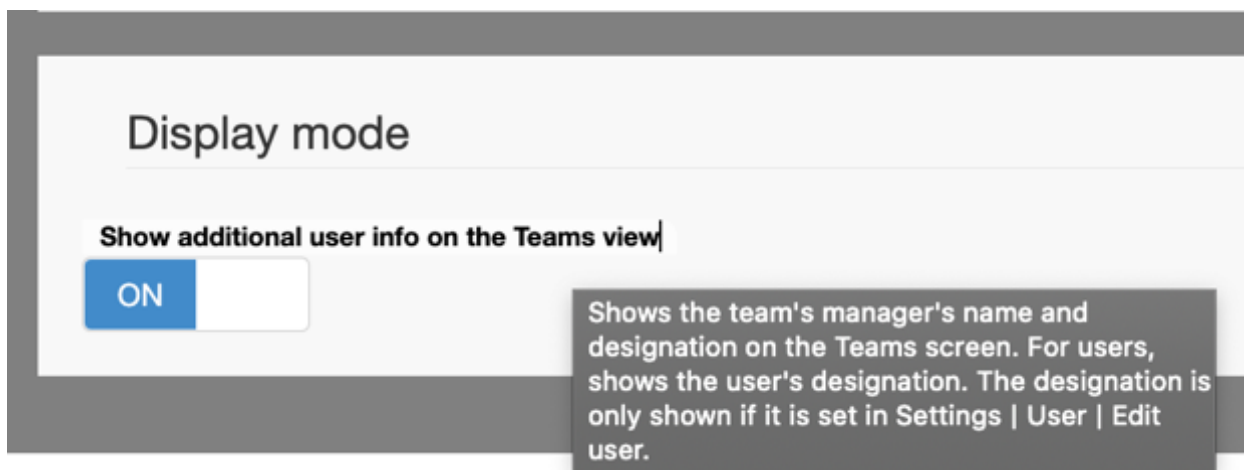
Manage your own user profile



Manage profile of your teams' users



Augment dashboards with additional user info





Tree depth

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

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

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



Reminders

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

kippy Support


Reminder

To: nauman.khan@thesolutioncrowd.com

2 October 2021 at 13:02

S

Reminder



Please update last months actuals for the following items

Team	Project Milestone or KPI	Name
CEO	KPI	Invite new prospects

Log in

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

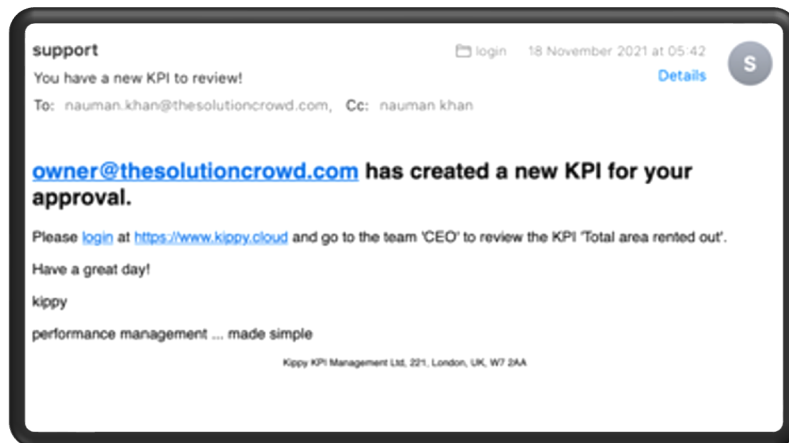
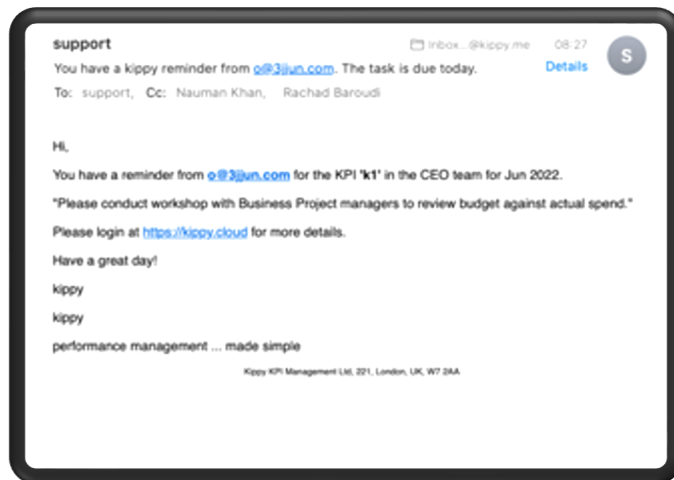
Click here to [unsubscribe](#) from these emails.

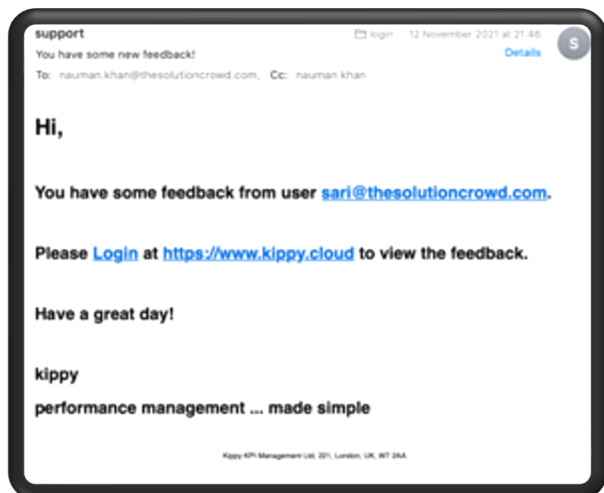
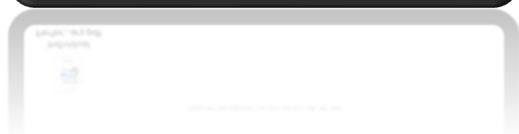
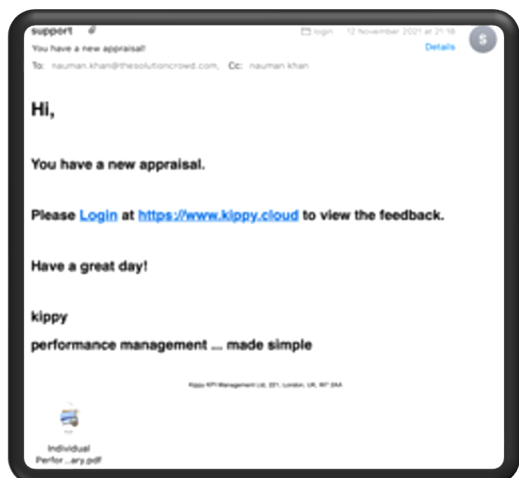
Kippy KPI Management Ltd, 221, London, UK, W7 2AA

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

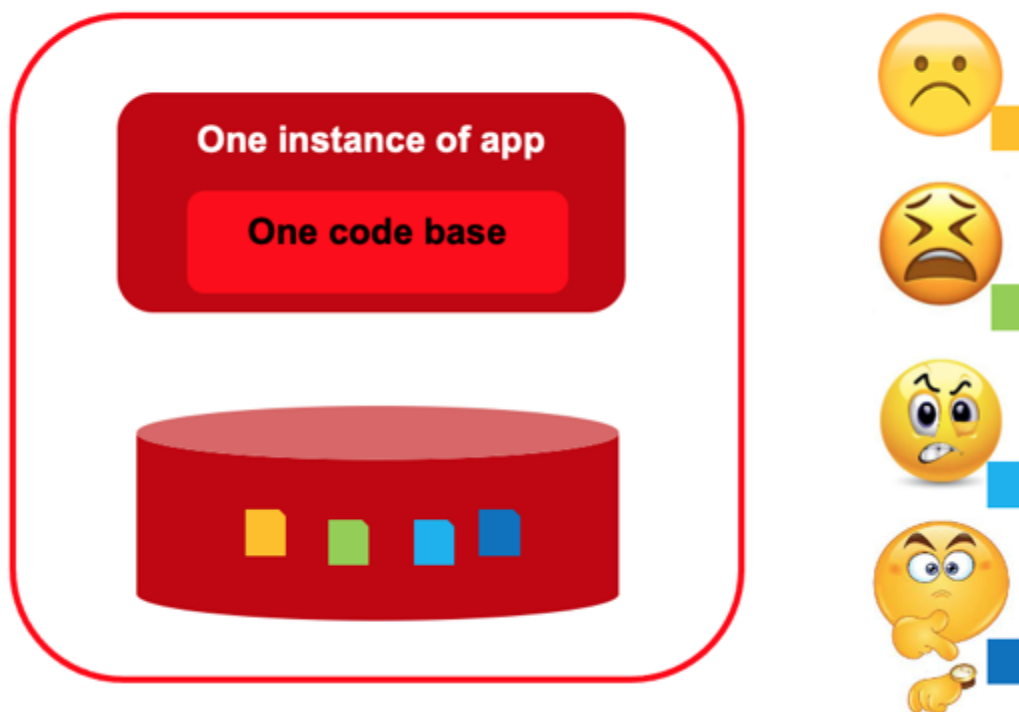
From a technical perspective, kippy is unique in that it does NOT provide a rigid Commercial off-the-shelf product.

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.

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

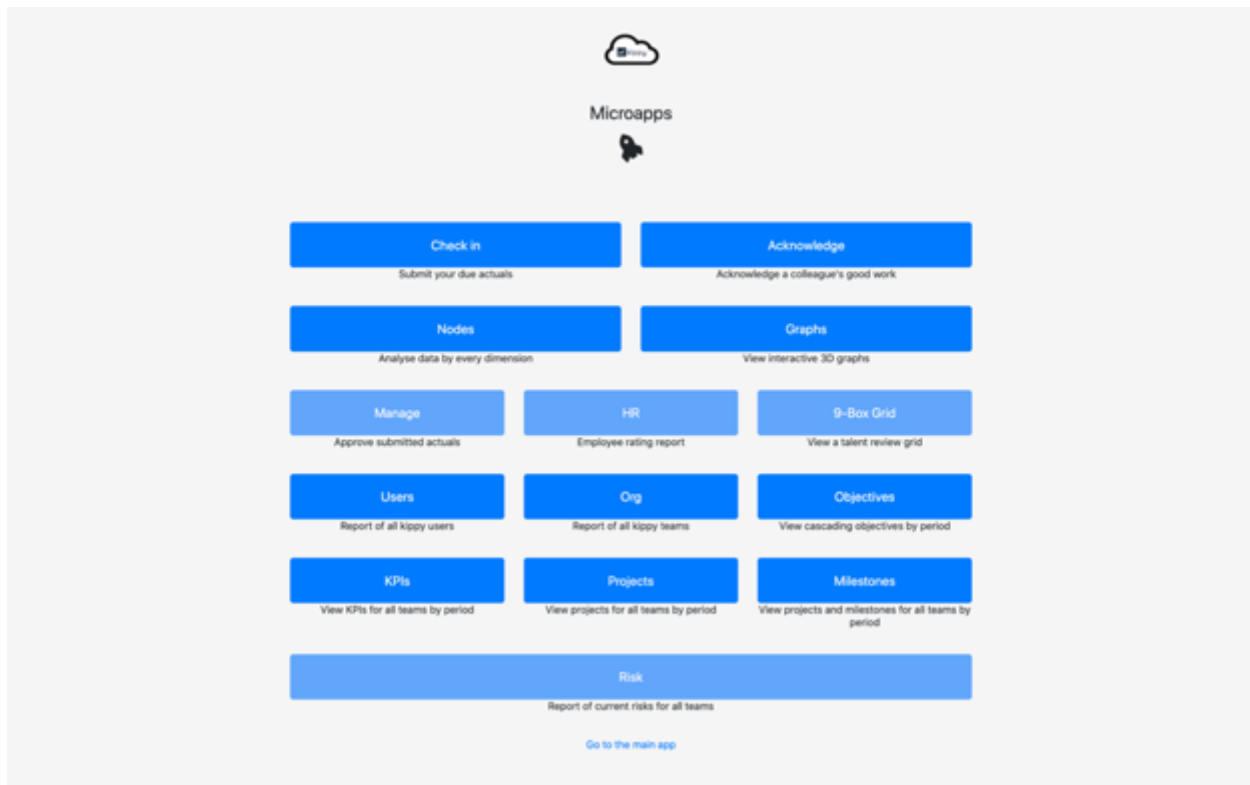
Functions



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

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

Microapps



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

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

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

Dedicated environments



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

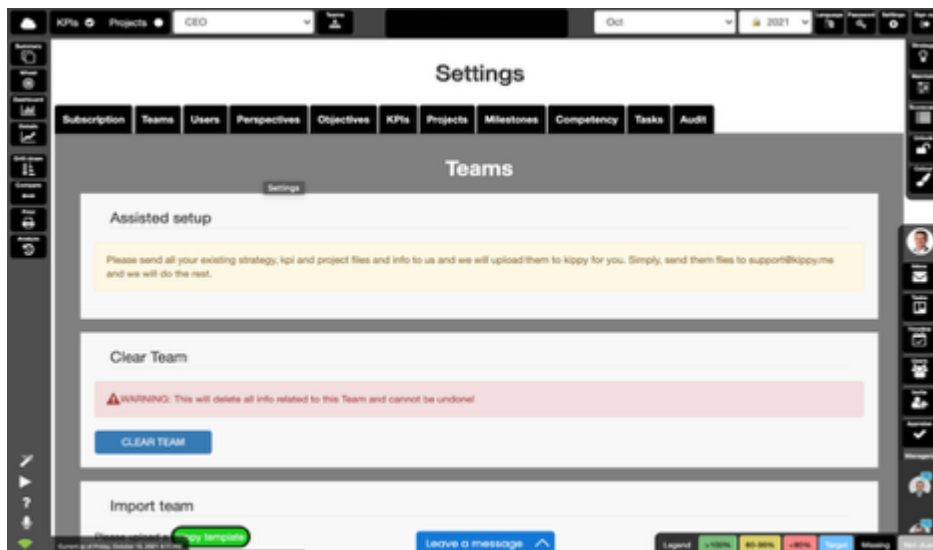
Your Kippy instance can be deployed to

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

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

Fully configurable

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



This includes

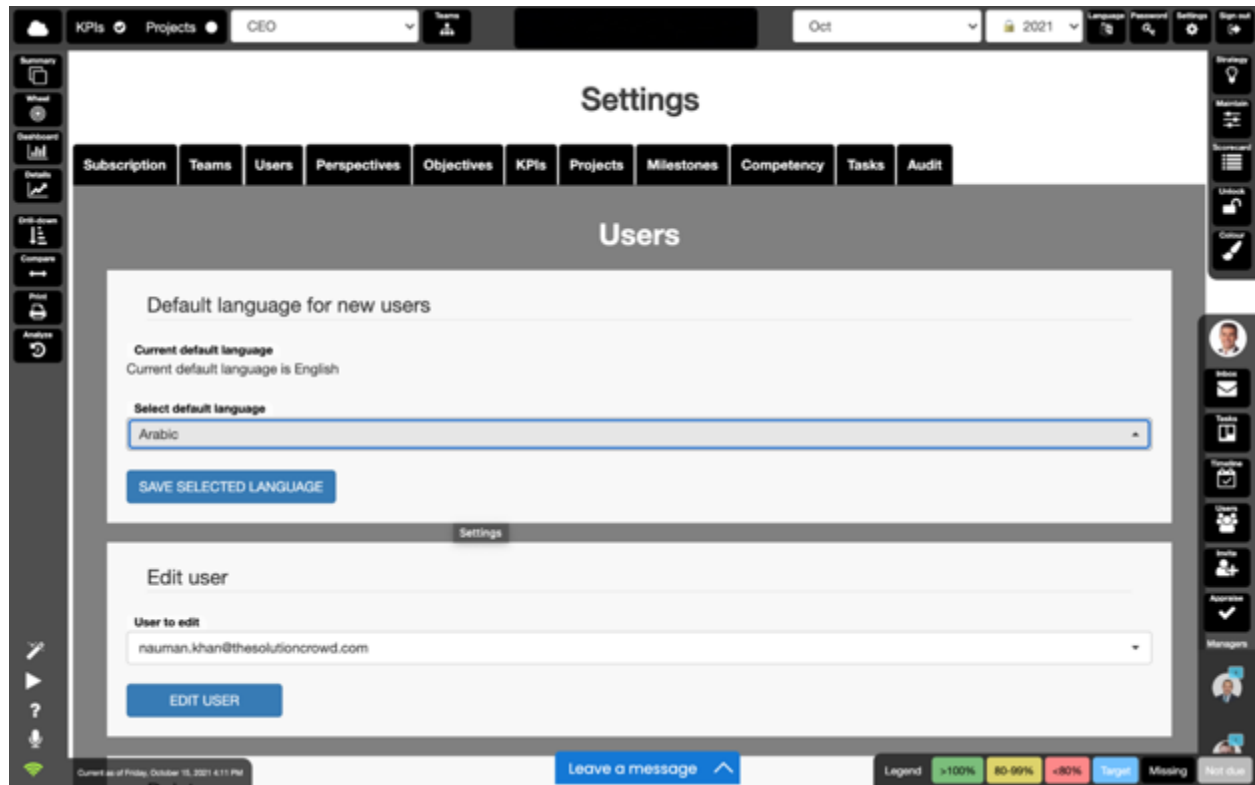
- changing 1x,2x,3x to greater than 3 (e.g. 1x to 100x)
- locking appraisals
- complex weighting and score calculation configuration
- changing default language and color themes
- resetting passwords
- full user management
- edit, rename, move and delete perspectives, objectives, KPIs, projects and milestones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

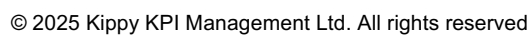
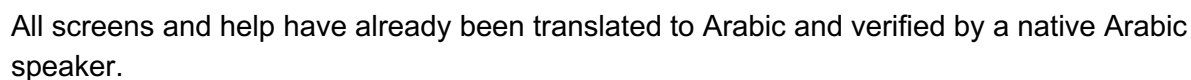
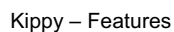


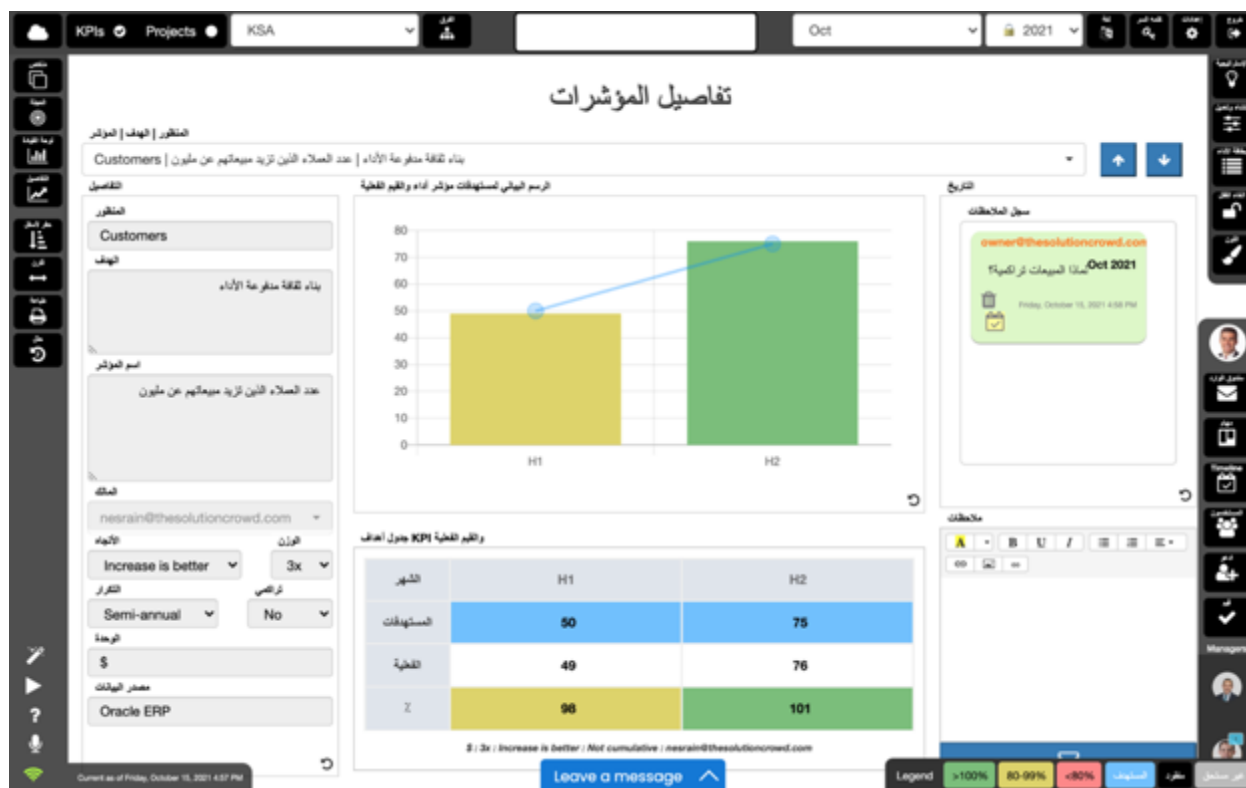
- allow managers to quick set up
- ensure managers set appraisal notes before saving appraisal
- allow full unlock of the system whilst setup is being completed
- calculating non-cumulative KPI/OKR scores on the last score vs the average of the scores that year to date.

Multi-language

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

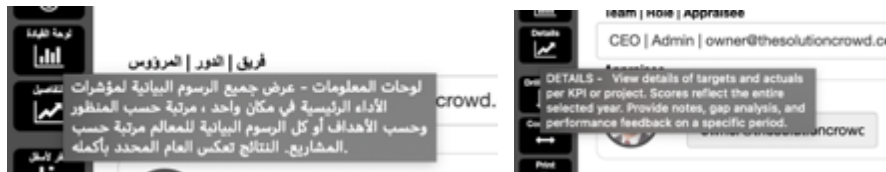




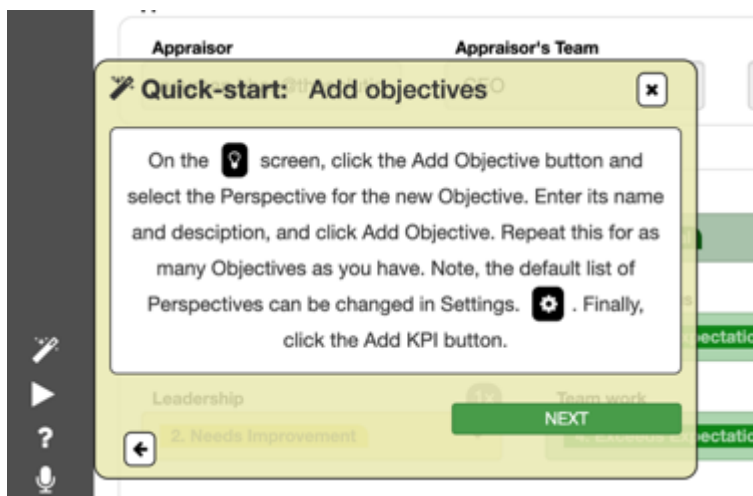


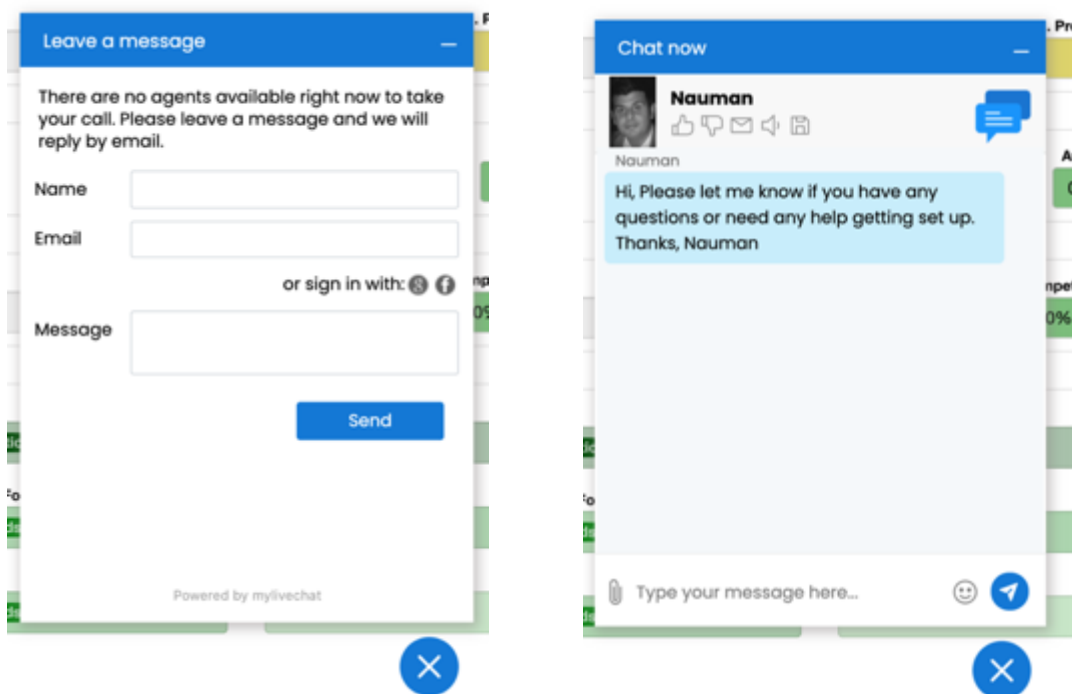
Help

All labels come with helpful help text on mouse hover.



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

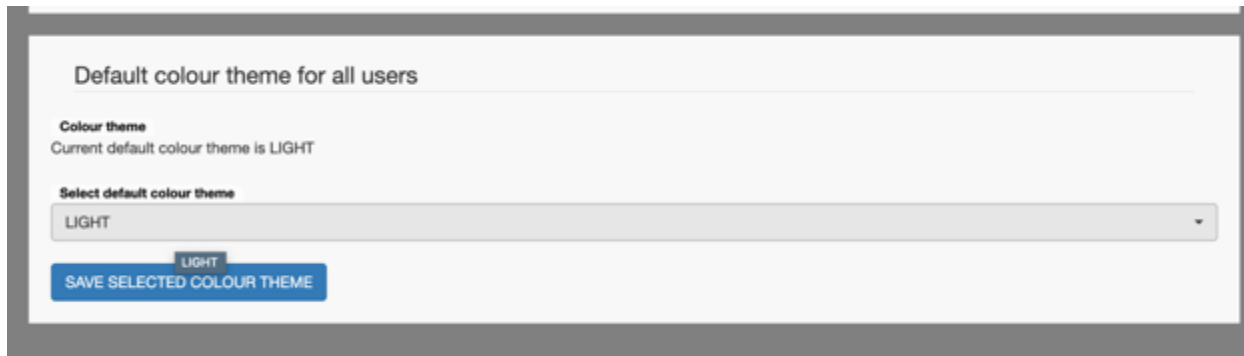




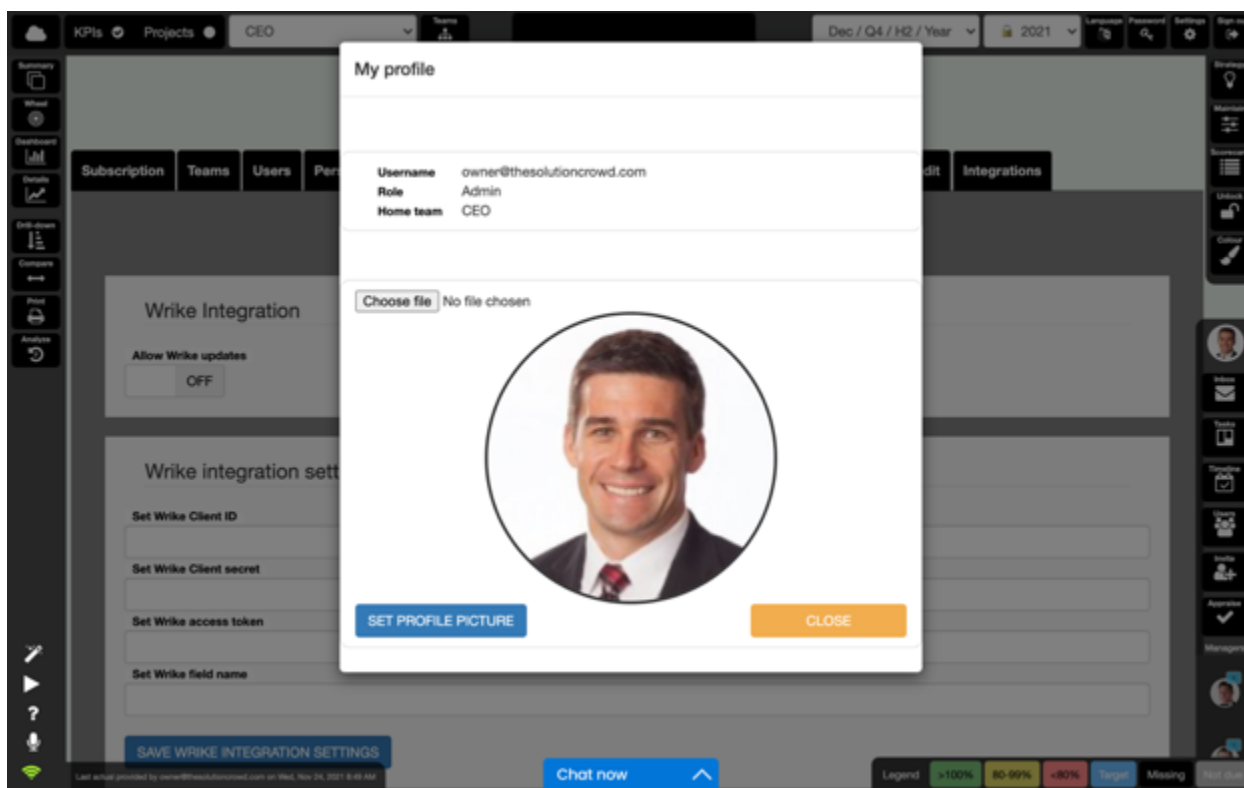
Free user manuals, how-to guides and help articles are also available via the Help buttons in the app and on the website www.kippy.cloud

Personalisations

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



Set user profiles or let users self manage.





Mobile responsive

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



Mobile app

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







Navigation

Voice control

Change screens using your microphone.

 **Kippy - Voice Commands - Cheat Sheet**

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

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

Keyboard shortcuts

Shortcut to screens by pressing Shift and Function keys:

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

Tactile dashboards

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



Customisations

The system is integrated with OAuth2.0 identity mechanisms including Google Login, Slack Login and Microsoft Entra (formerly known as Microsoft Active Directory).

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

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

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

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

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

Detailed use cases available on www.kippy.cloud for using web APIs for data exports.

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

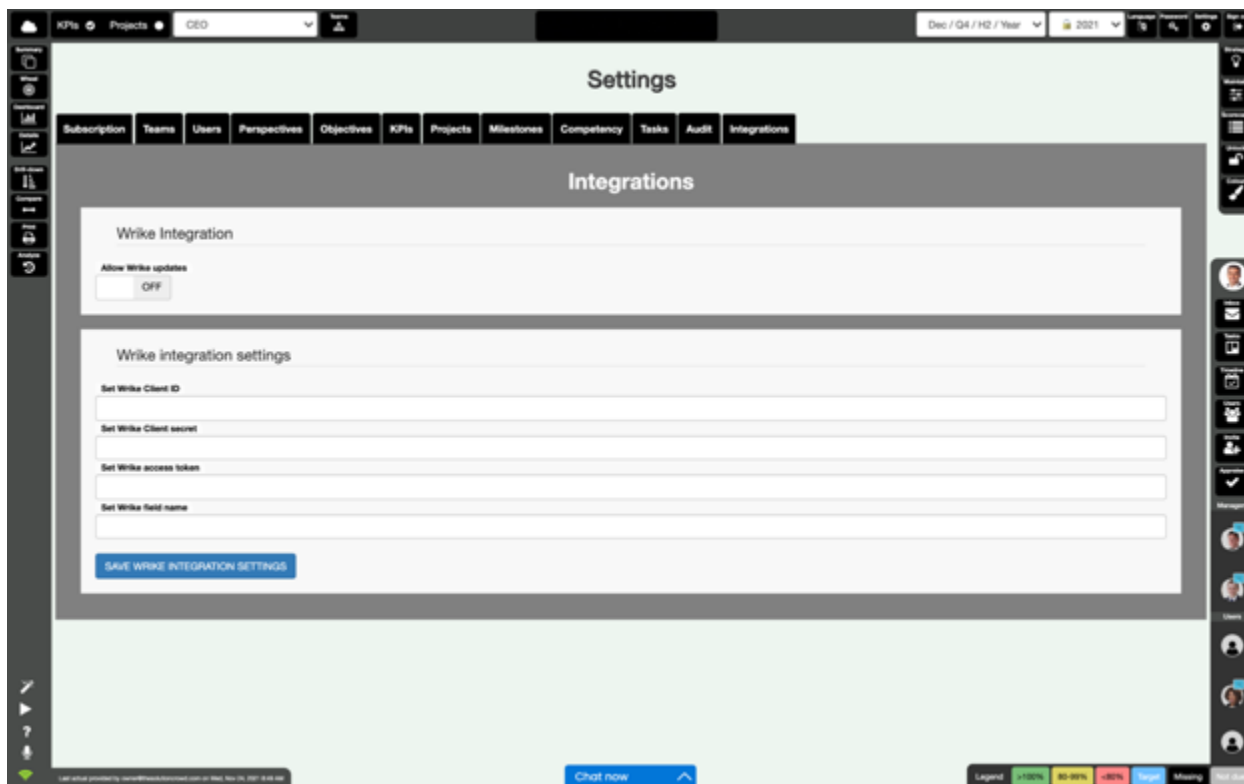
<https://www.kippy.cloud/automate-your-business-processes>

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

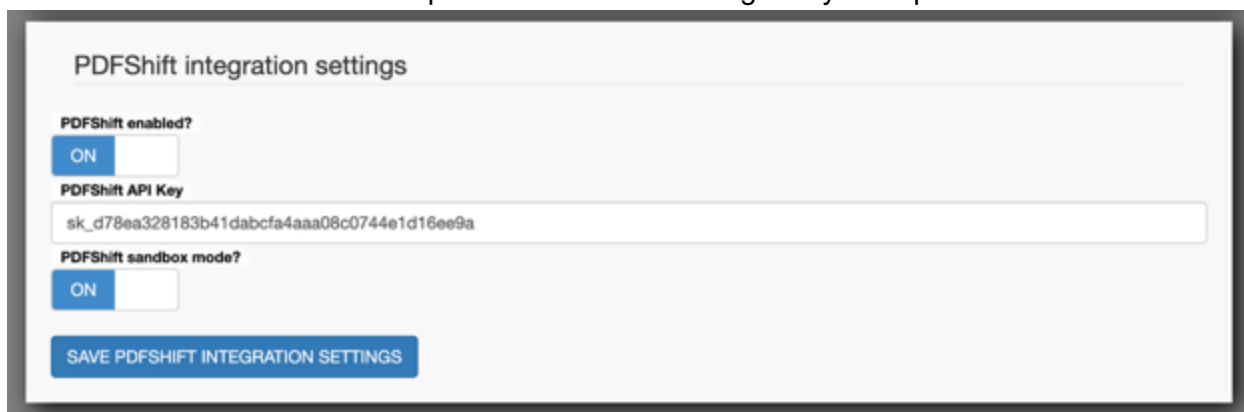
<https://www.kippy.cloud/functions-adapters-and-integrations>

Built-in integrations

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

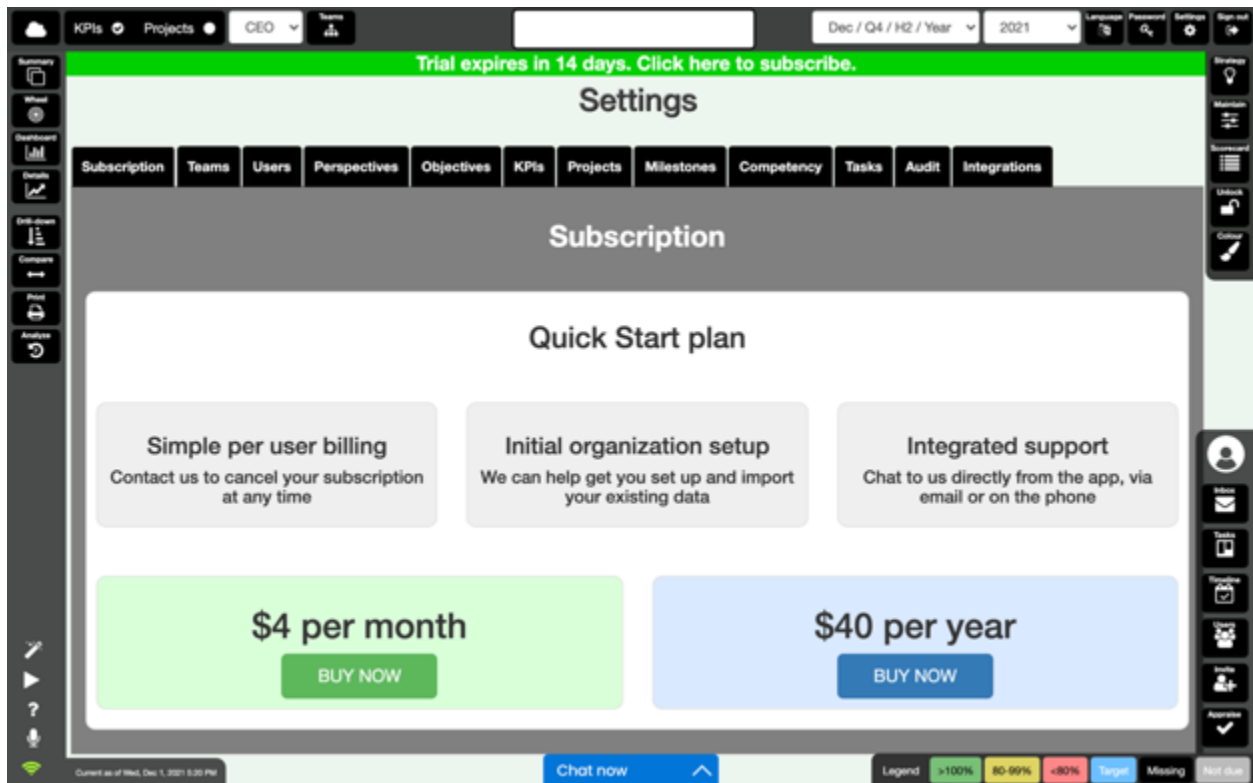


The PDFShift integration allows scheduled reports to be sent with advanced visualisations. Please visit <https://pdfshift.io> to get your API key. Setting sandbox mode to on allows the service to be used for free – but puts a small PDFShift logo on your reports.



Billing

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



Invoice based billing available for bulk and enterprise usage.



Security

Authenticate with Slack, Google and Microsoft single-sign on. Plus multi-factor authentication.

- 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.
- End-of-contract data extraction - All the users data is available to the user via the web APIs at any time. All kippy data is regularly backed up. However, users are also encouraged to take extracts of their data for backups or local integrations as often as they choose.
- Kippy is fully functional on all modern browsers. Google Chrome is the recommended browser. No application to install. Designed for use on mobile devices.
- The service interface is part of the application but only available to users with the appropriate role. The interface allows the user to self-serve any maintenance activities - including adding, renaming, deleting, moving all data objects. All activities are fully audited and follow governance rules to ensure system integrity. The service interface is only available to the appropriate system user, who can a) view the audit log to be viewed b) bulk import existing KPI data c) delete users from the system.
- Kippy is designed to ensure there is practically no usage based impact across users because:
 - - most complex processing is done in the client's browser and not on the kippy servers.
 - - hosting provides rate limiting and DDOS protection



- - sophisticated caching refreshes in low-priority background jobs
- - sophisticated auto scaling-up of underlying hosting resource to over 1000 times typical load (which auto scales-down to reduce cost)
- Staff security clearance - Conforms to UK standard BS7858:2012 and Developed Vetting (DV) and OWASP
- Default Data storage and processing locations. United Kingdom. Other hosting options available.
- Data Centre security standards - CSA CCM version 3.0
- Penetration testing frequency - At least once a year. Additional Pen Testing available upon requests.
- Protecting data at rest - Physical access control, complying with CSA CCM v3.0. Physical access control, complying with SSAE-16 / ISAE 3402. Scale, obfuscating techniques, or data storage sharding.
- Data export approach - Users can call kippy's secure web APIs (with the appropriate authentication credentials) to extract all their current and historical data in JSON format. Other data import formats - MS Excel template to collect and bulk upload existing info. Updates can be submitted using RESTFUL/JSON web API calls. No other system ingress or egress channels to data exposed.
- Data protection between buyer and supplier networks and Data protection within supplier network - TLS (version 1.2 or above)
- Approach to resilience - Multi-availability zone replication. Auto-scaling. Automated testing. Canary releases. Production Monitoring
- All configuration is managed with Infrastructure as code (IaC) principles. All code is managed in a private GitHub repository. All changes are reviewed with a formal Architecture design process with formal design documents. All builds and releases are tracked in the CI/CD pipelines. All releases are security and vulnerability scanned.
- Change management processes ensure all releases are a) released outside of business hours b) tested in a Stage production-like environment and c) canary-released before full roll out. API iteration is tracked through semantic versioning.
- Vulnerability management approach Each release is scanned using Google Cloud Web Security Scanner. Security fixes are given highest priority by the in-house development team. Patches can be deployed via the CI/CD pipelines within a minute.



Extensions

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

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

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

Contact us at info@kippy.cloud to learn more