kippy

Feature Overview

3 Apr 2025

version 1.21

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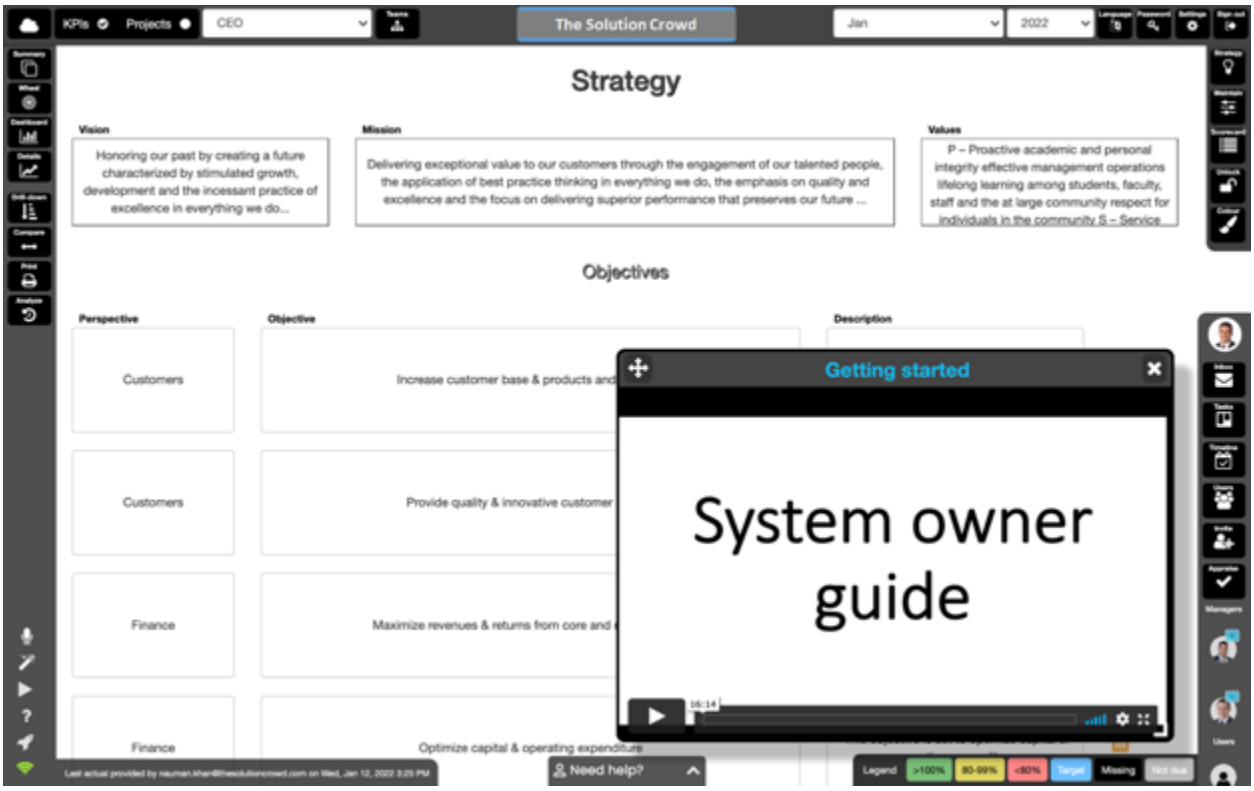
Intro

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.



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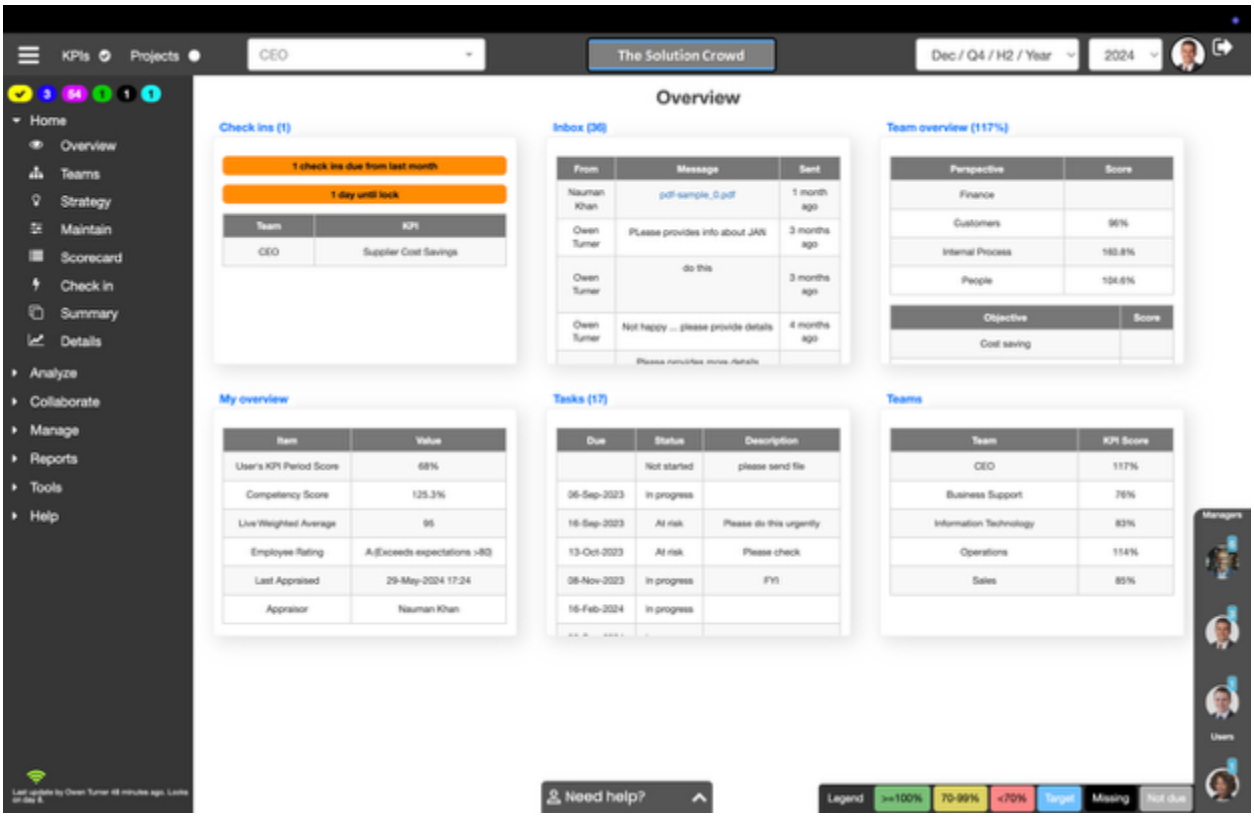
Overview

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



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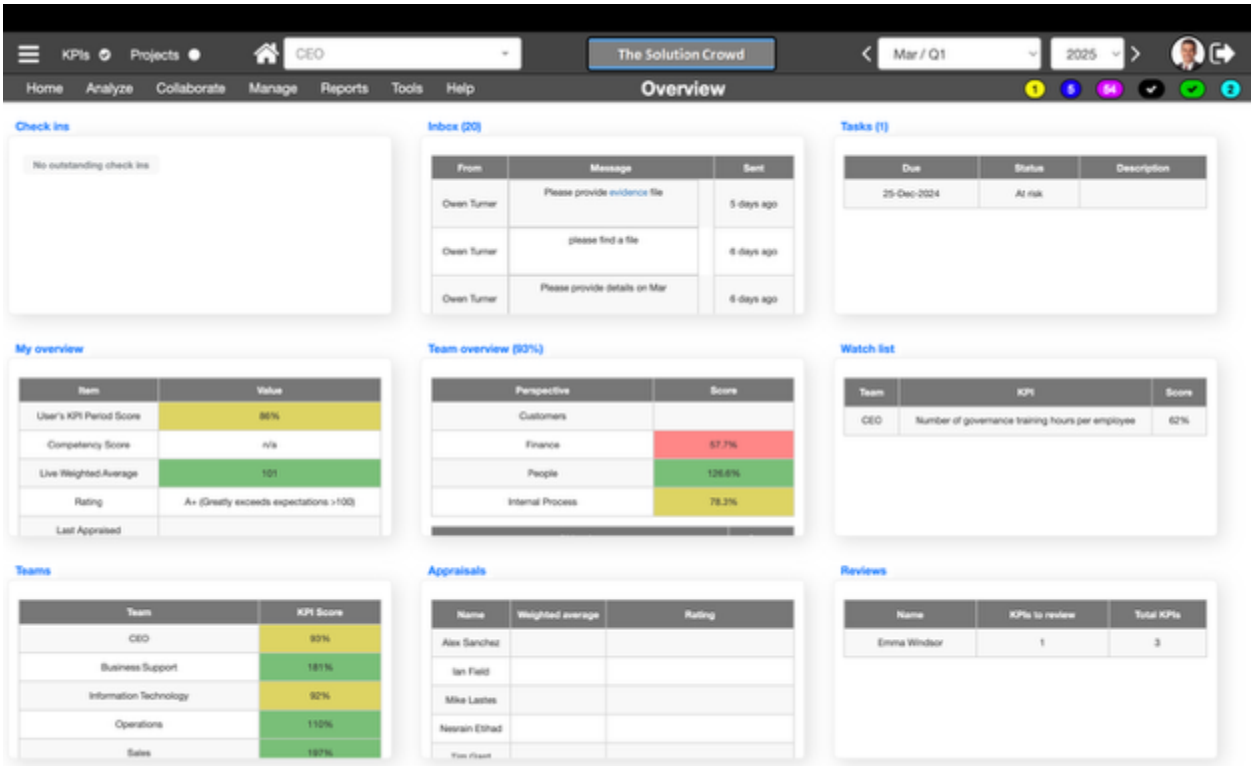
The overview is personalized by role so managers see more information.



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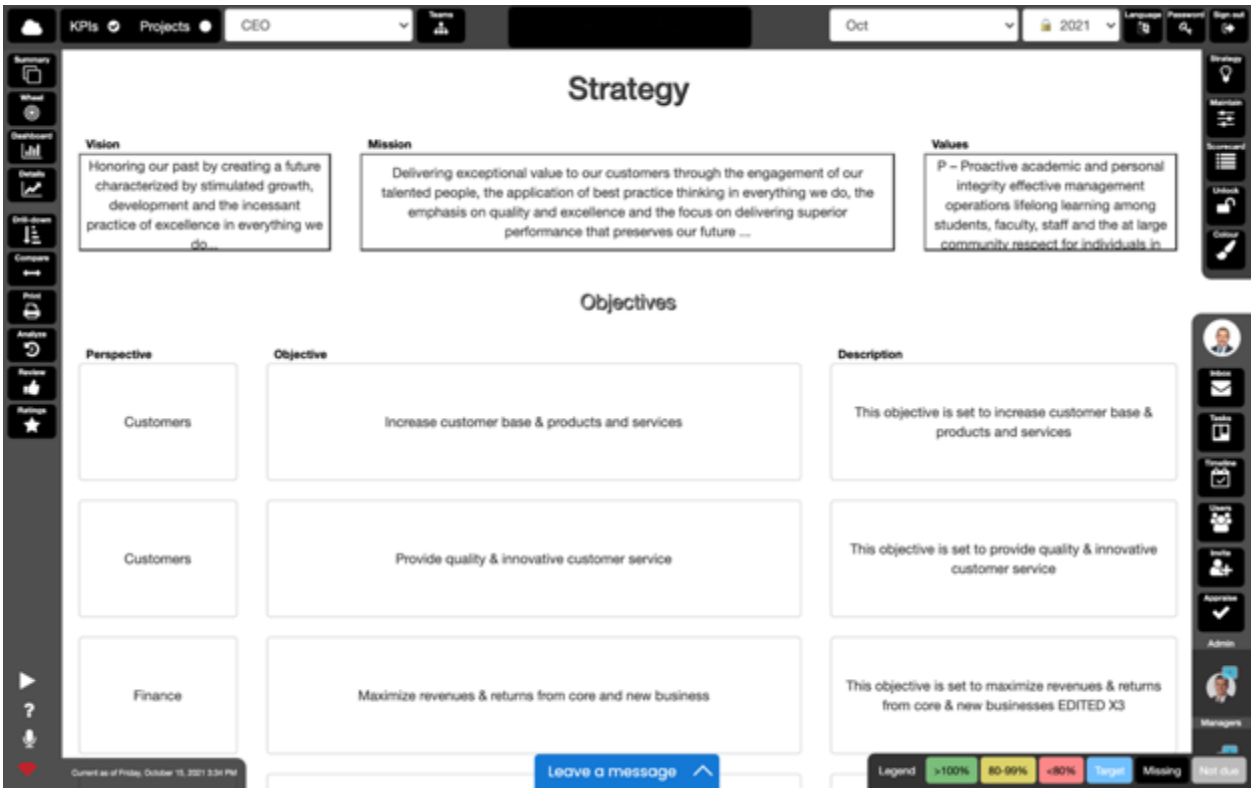
Strategy

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



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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.

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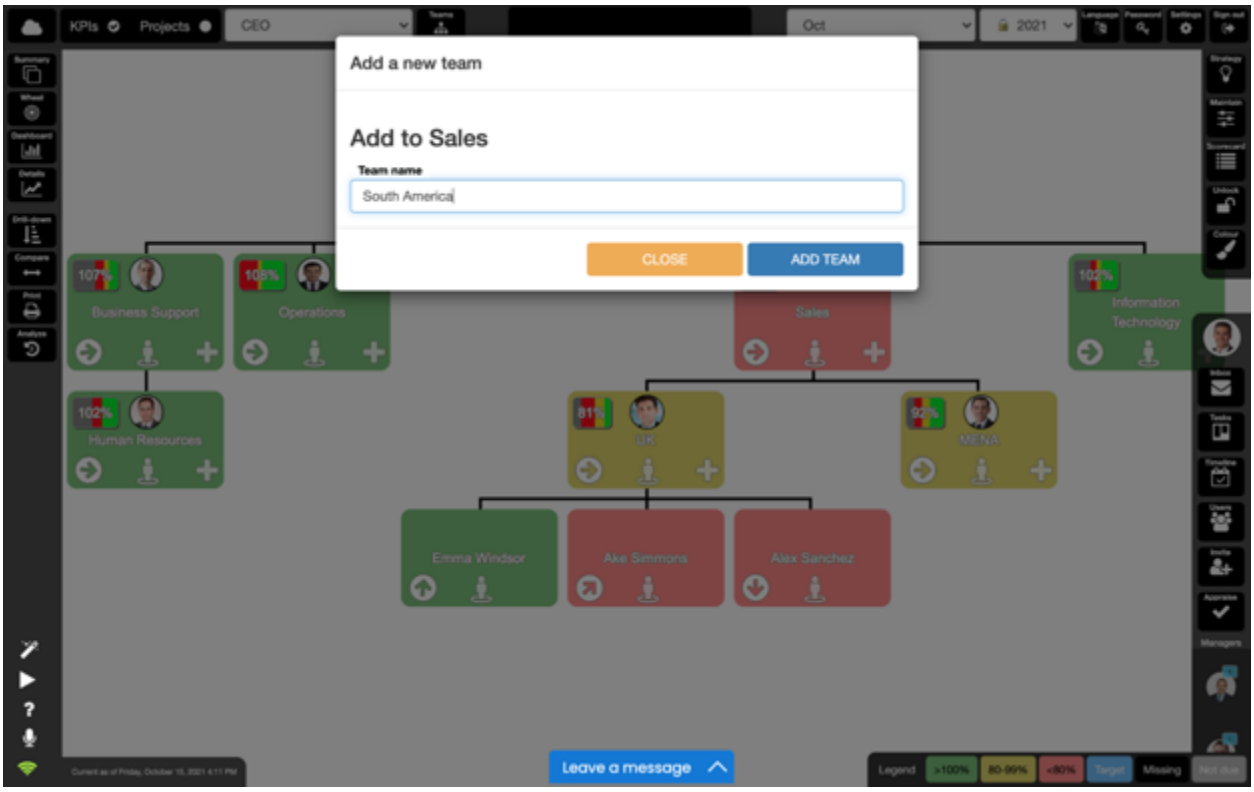
Add teams and people directly to the hierarchy.



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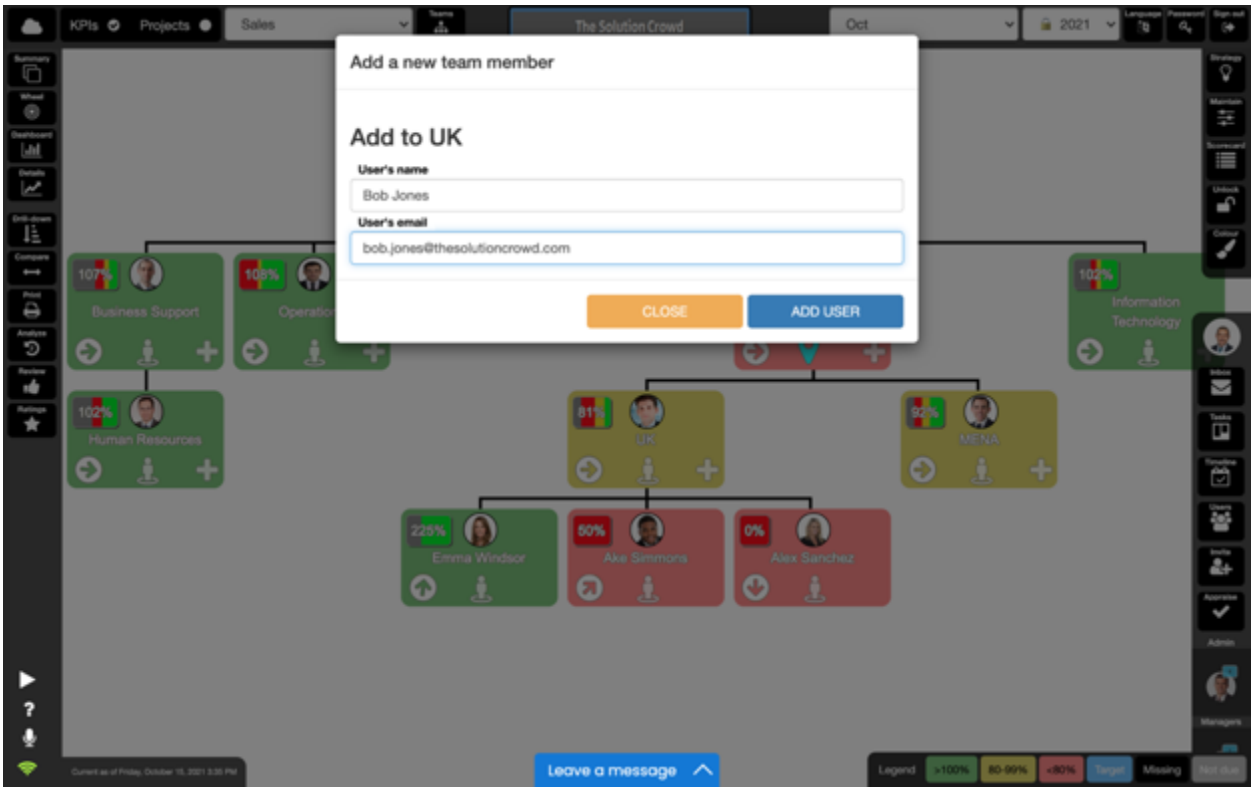

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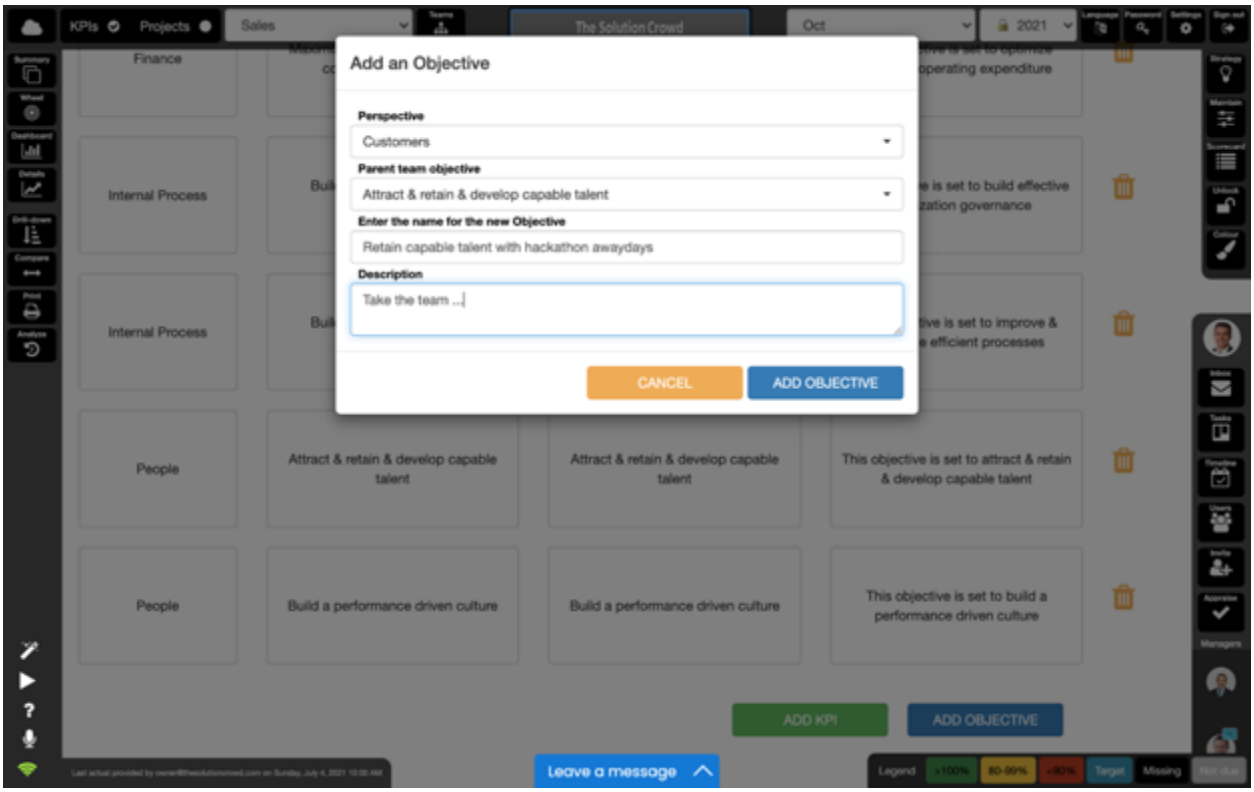
Objectives

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.

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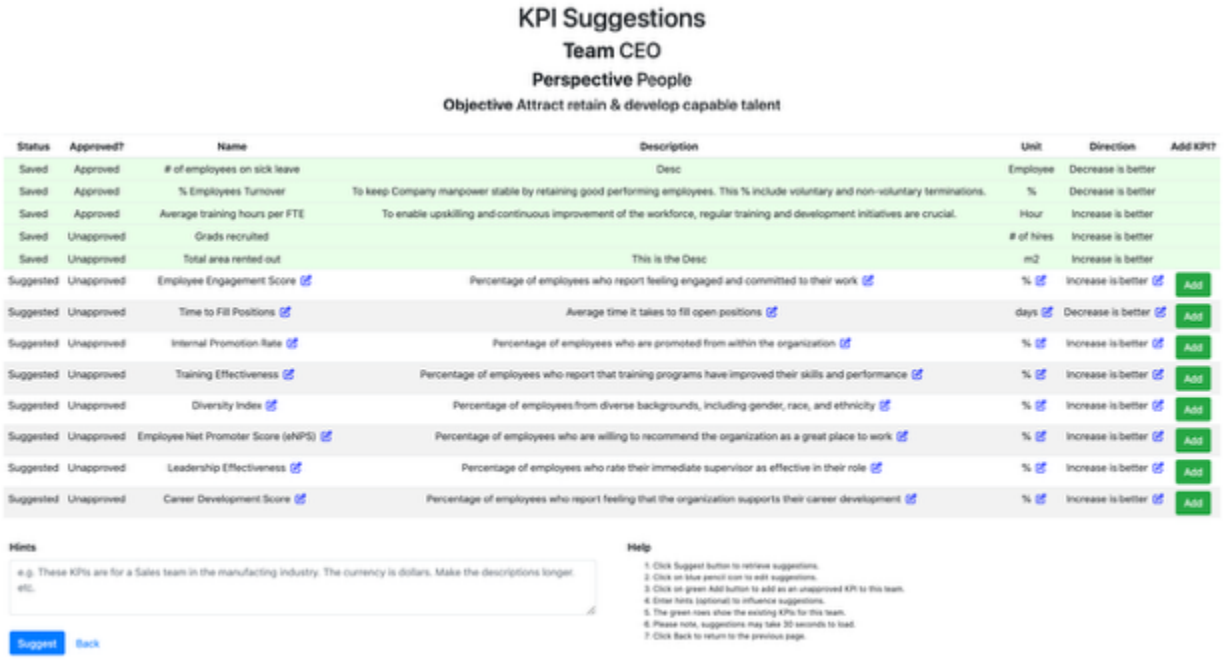
AI (Artificial Intelligence)

AI Suggested KPIs/KRs

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



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.

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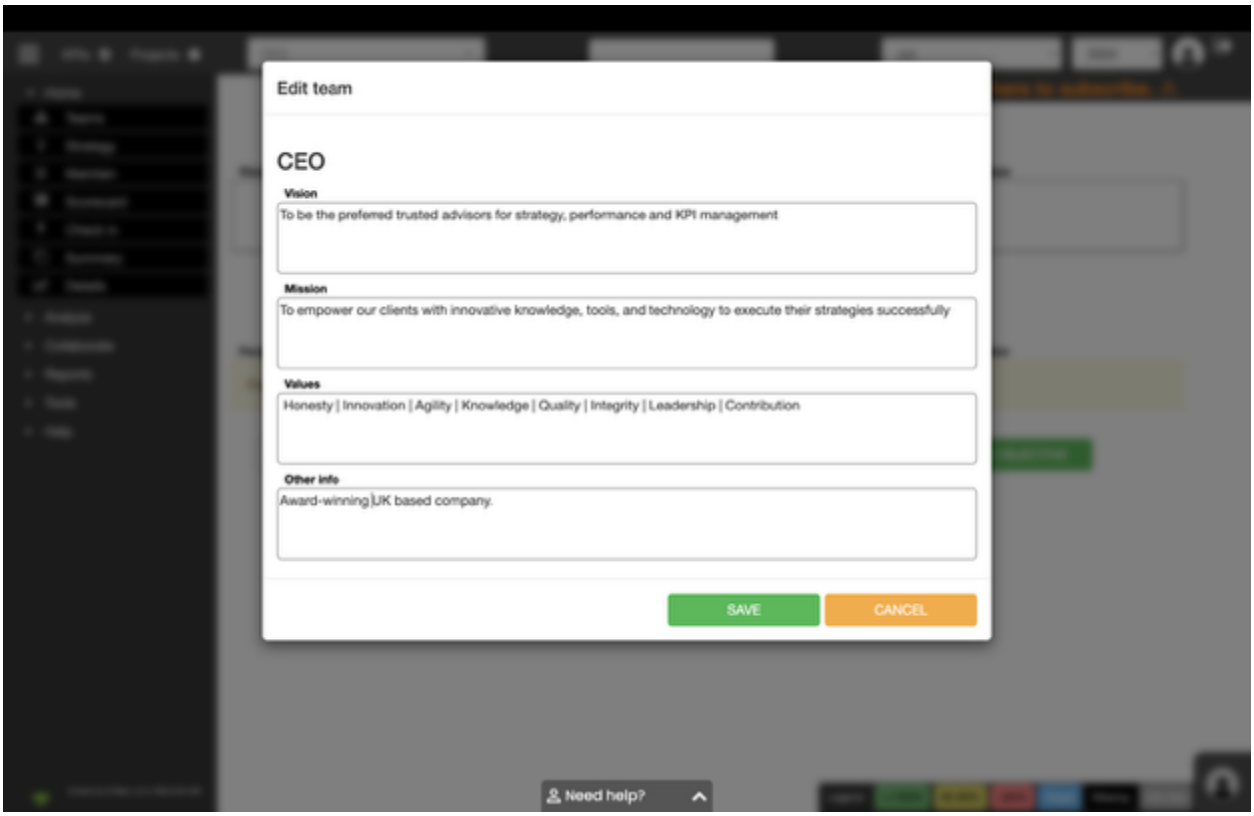

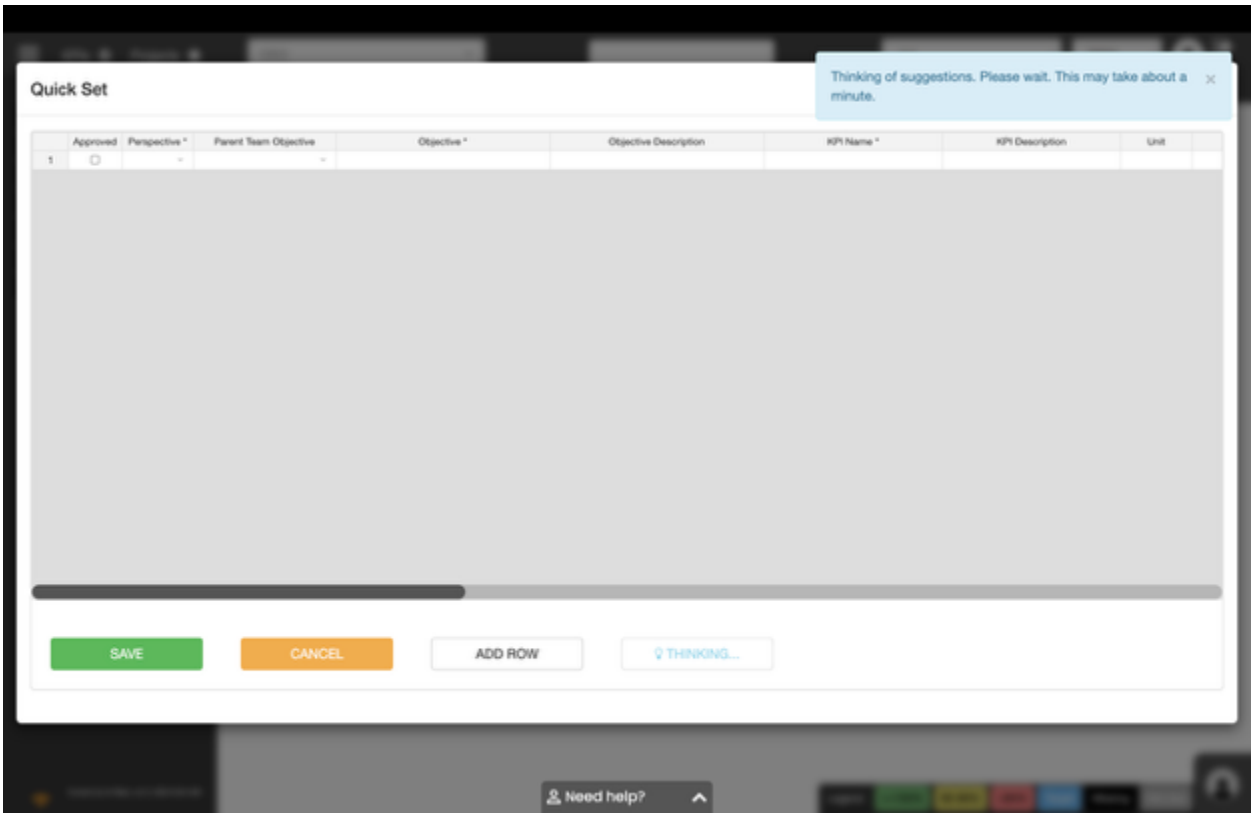

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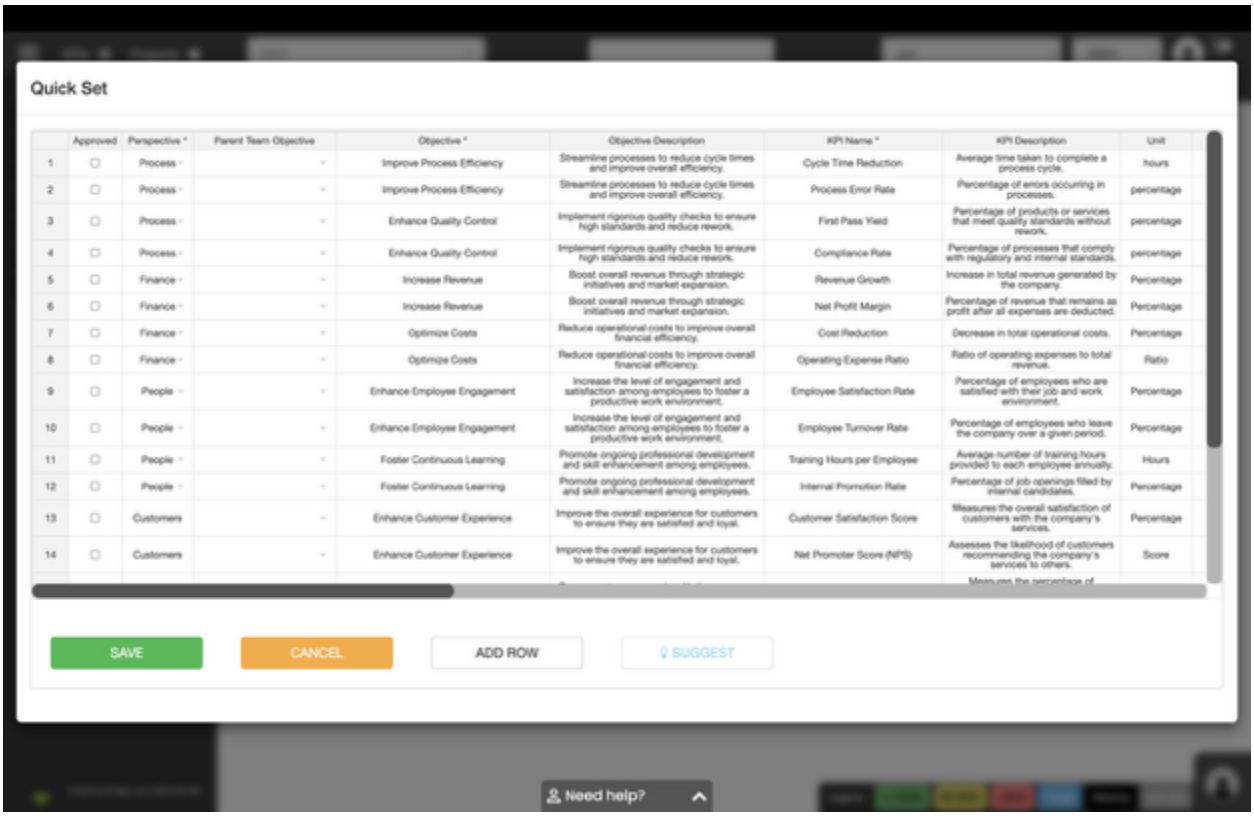

Tweak, approve and delegate for an instant strategy implementation.

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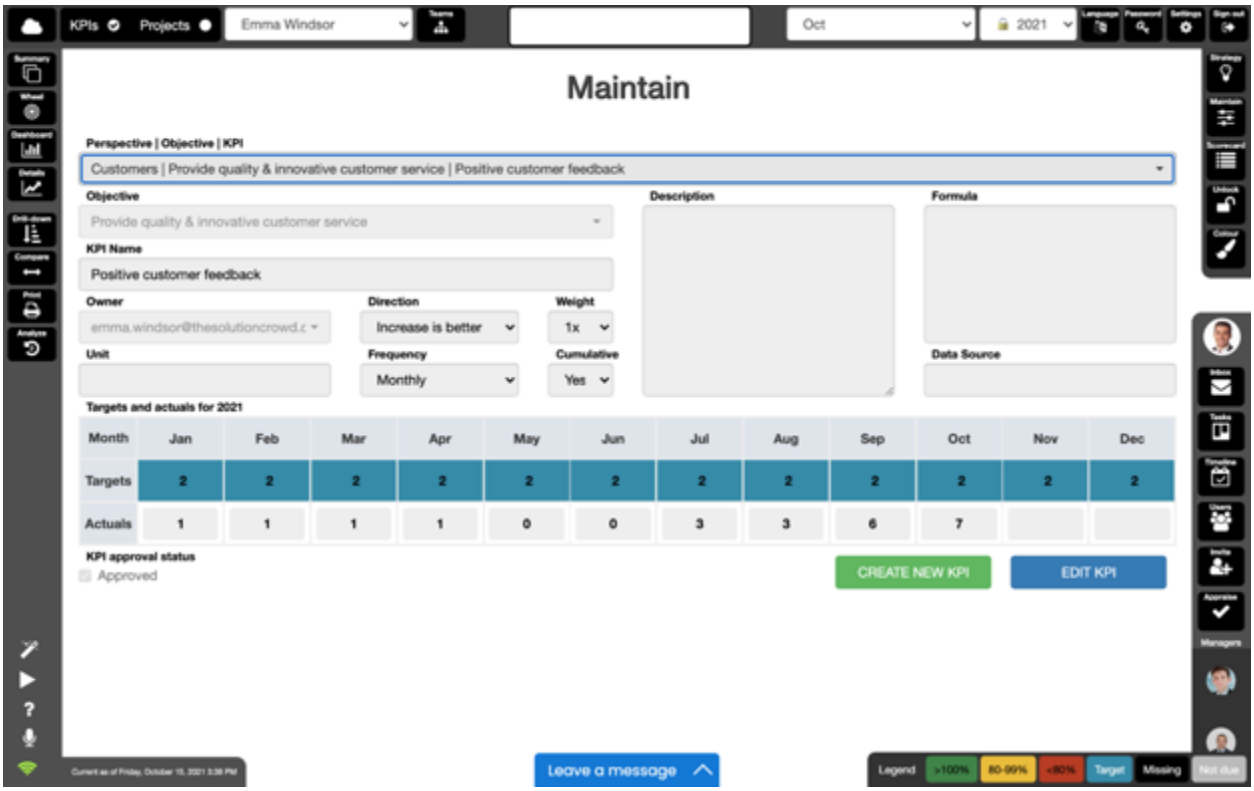
KPIs

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



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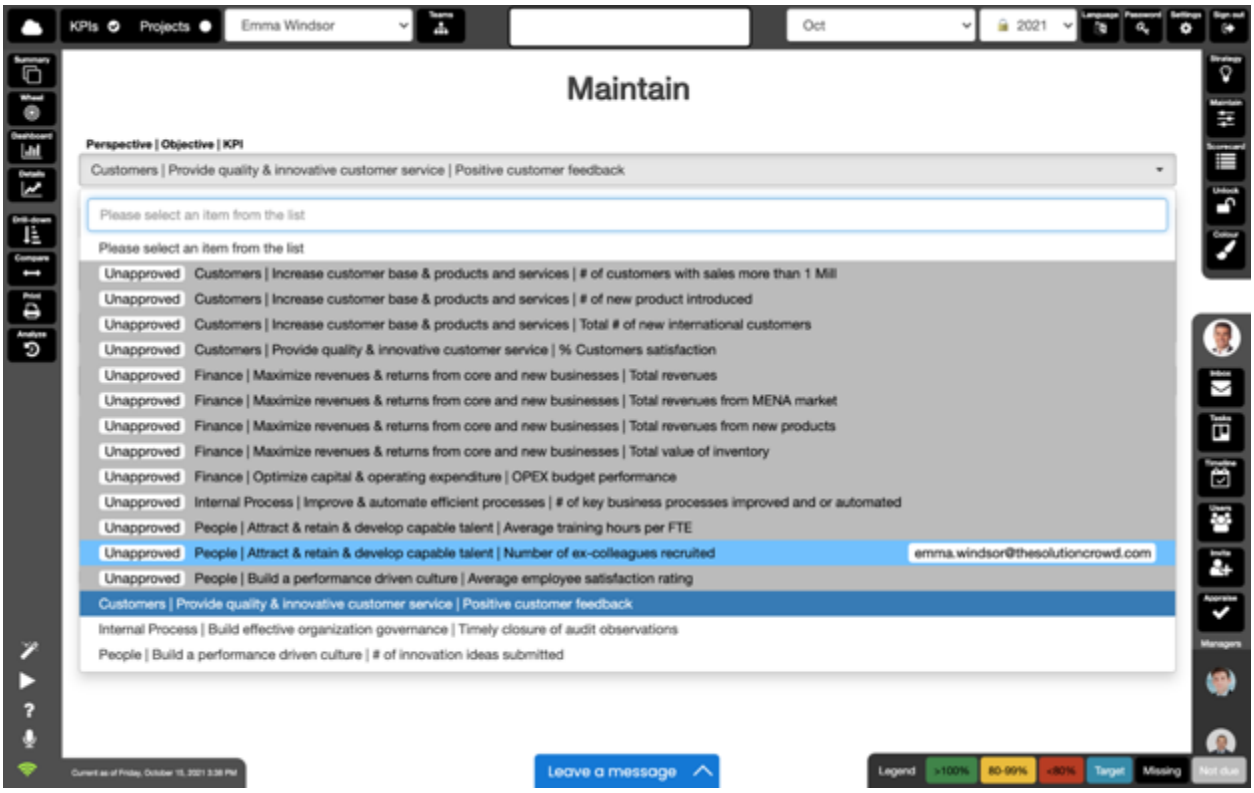
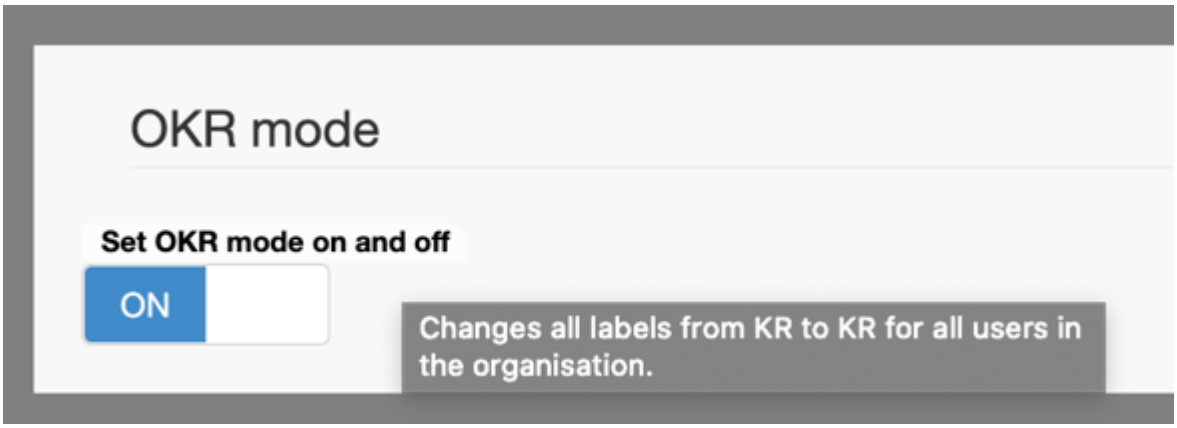
OKRs

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



Full OKR mode



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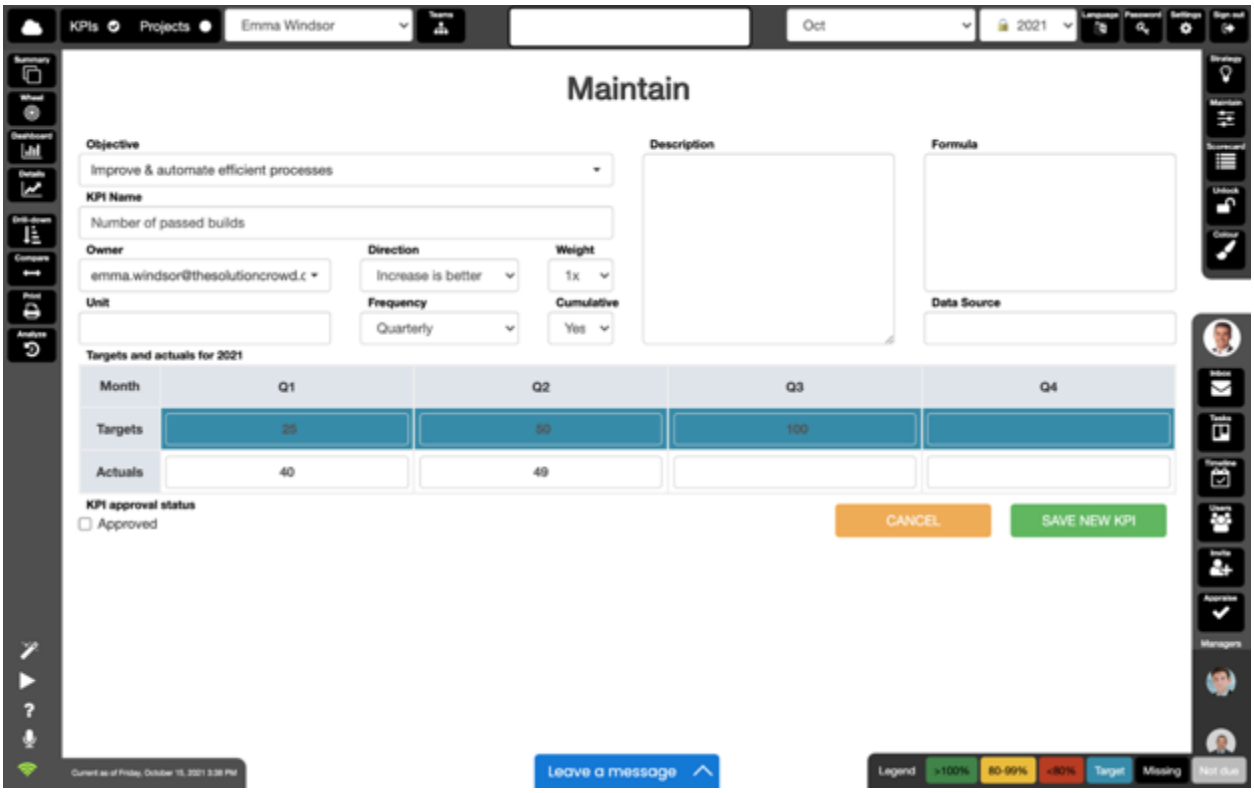
Targets

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).



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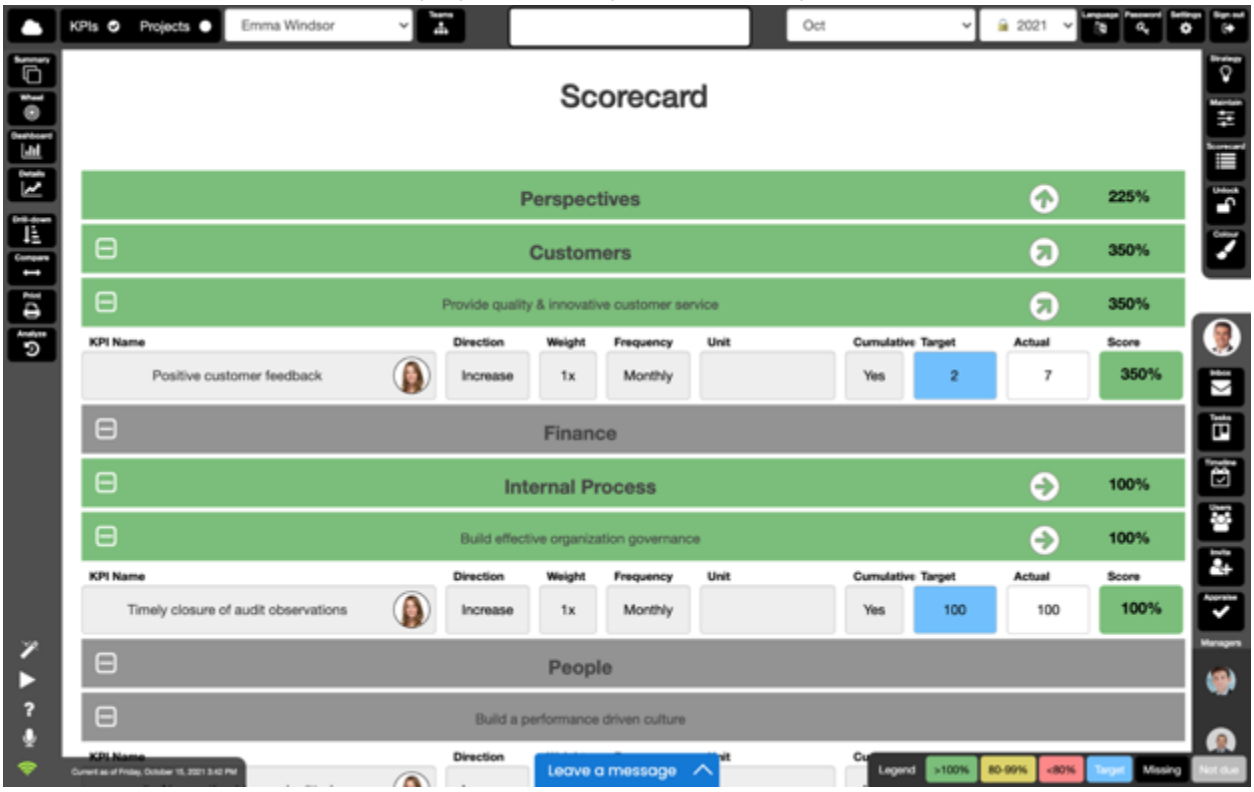
Updating Actuals

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



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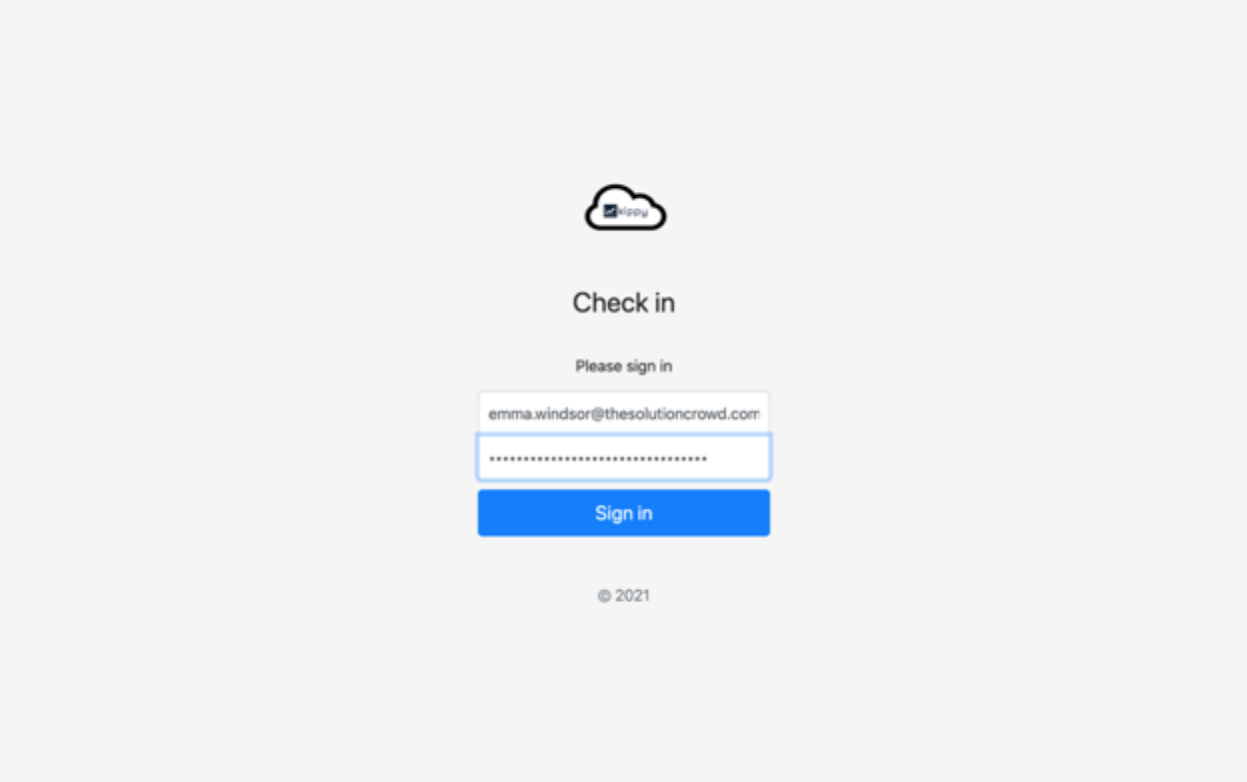
Check-in microapp

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



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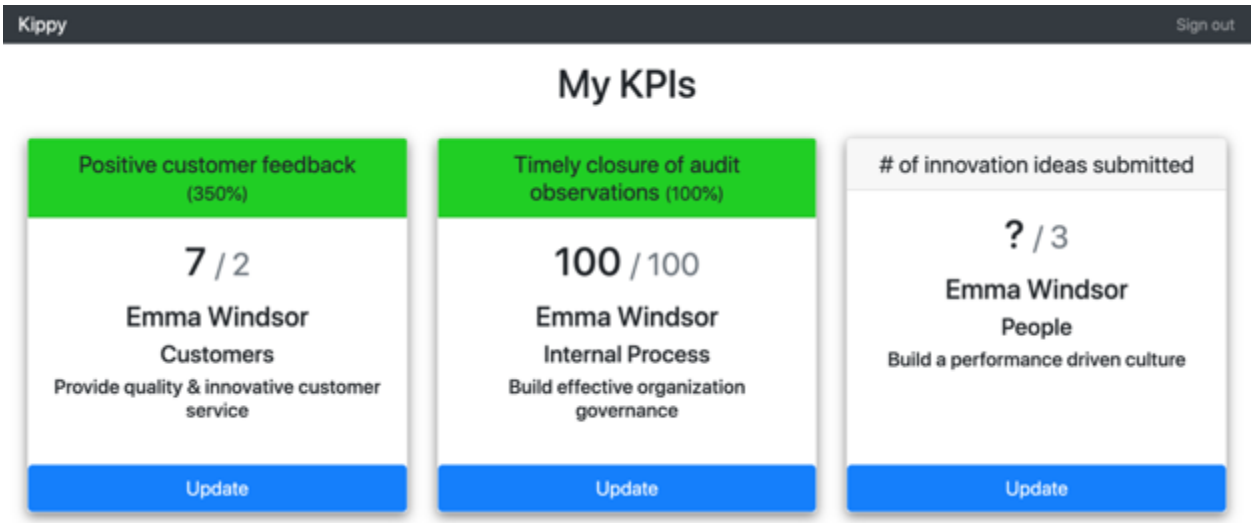
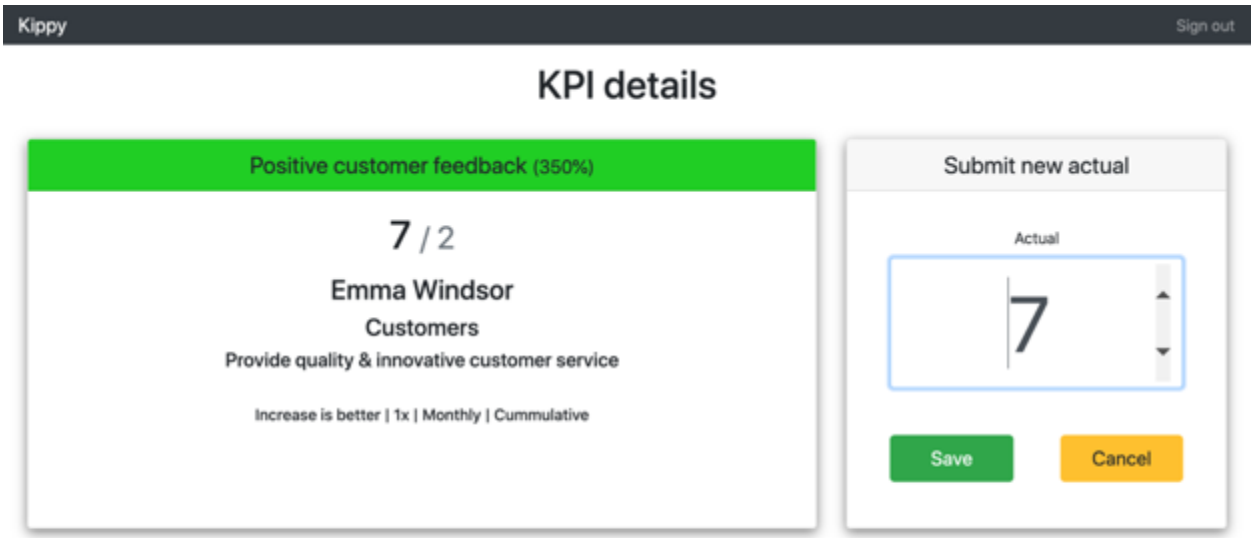


Summary

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		



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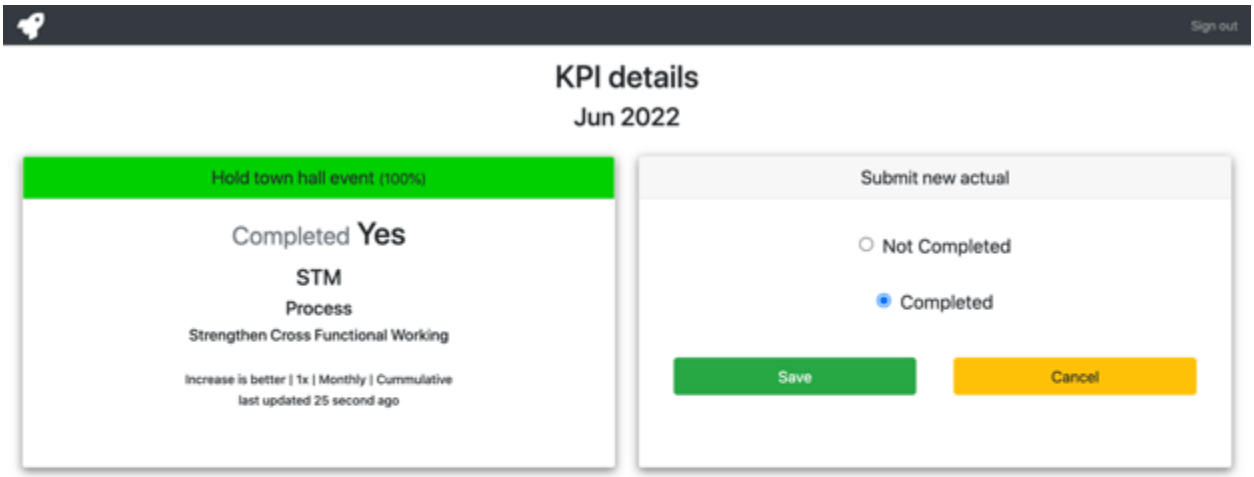
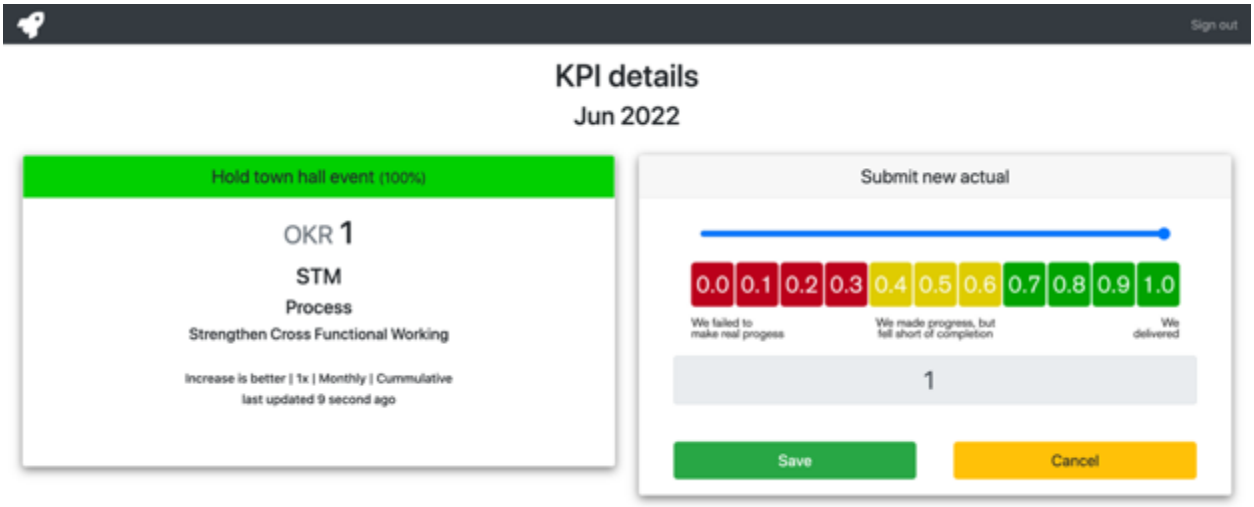
The check-in microapp will display different ‘widgets’ for input of the actual, based on the Unit of the KPI.

The KPI below has a Unit of Completed.



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



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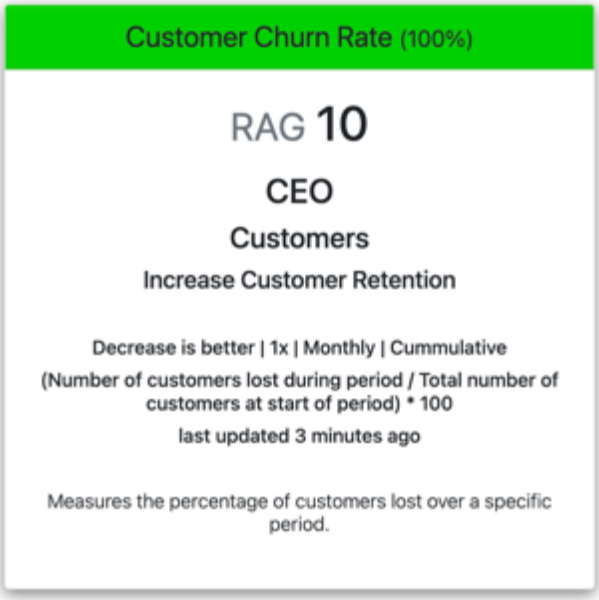

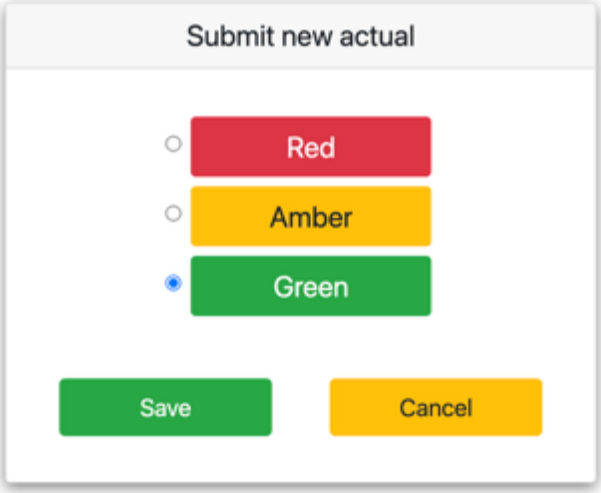

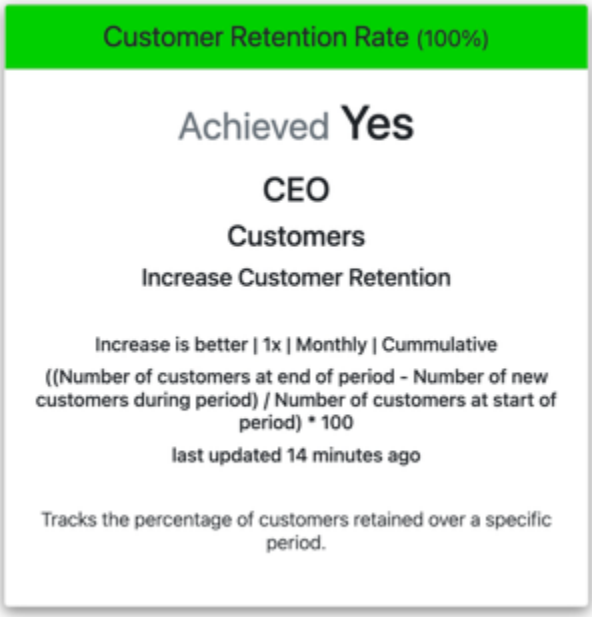

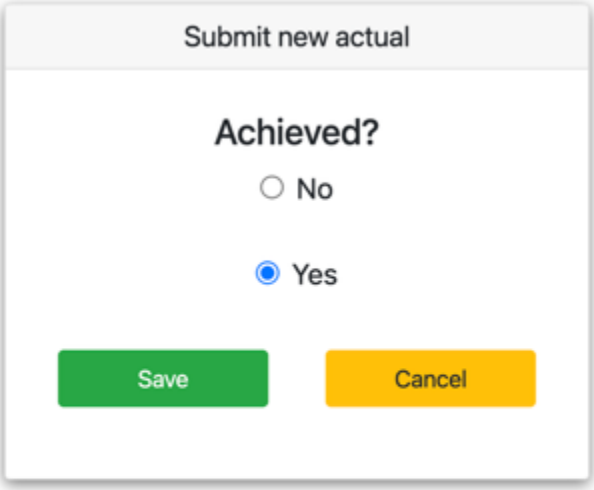

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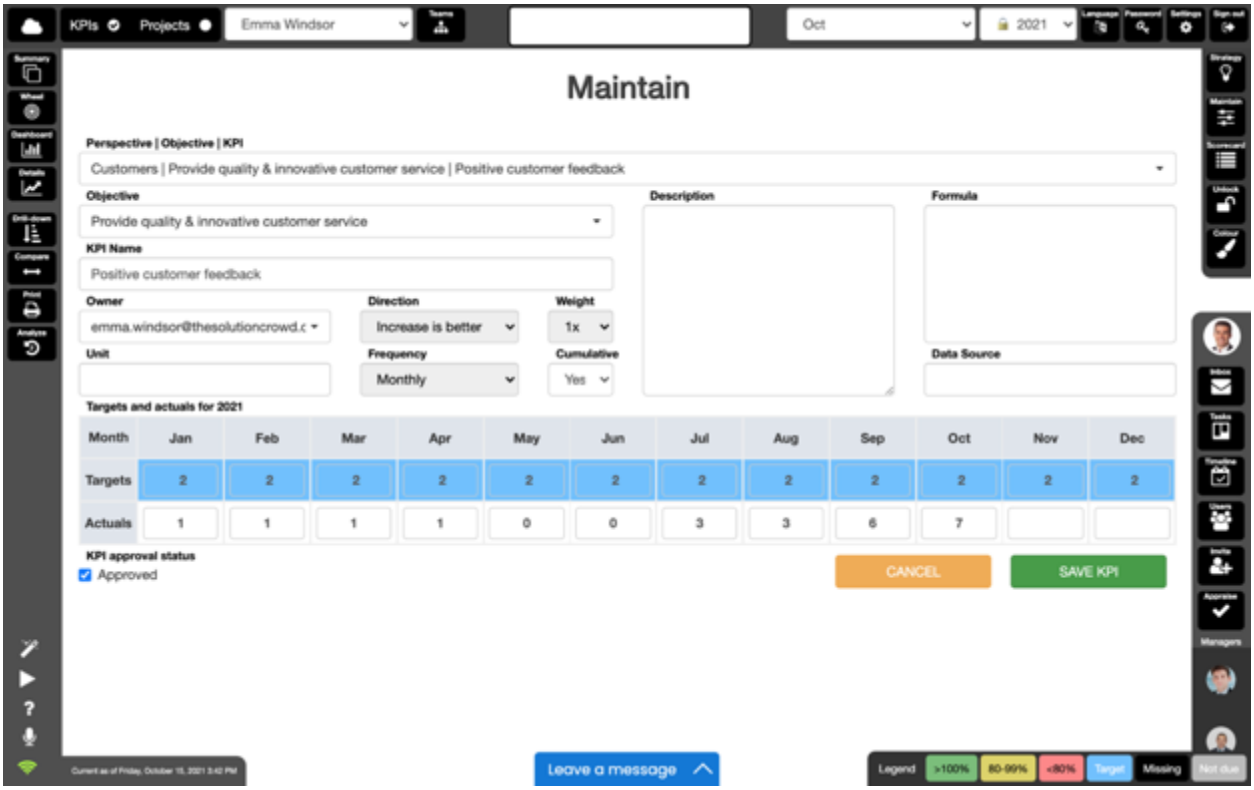
Maintain UI

- Actual can be provided directly by the manager



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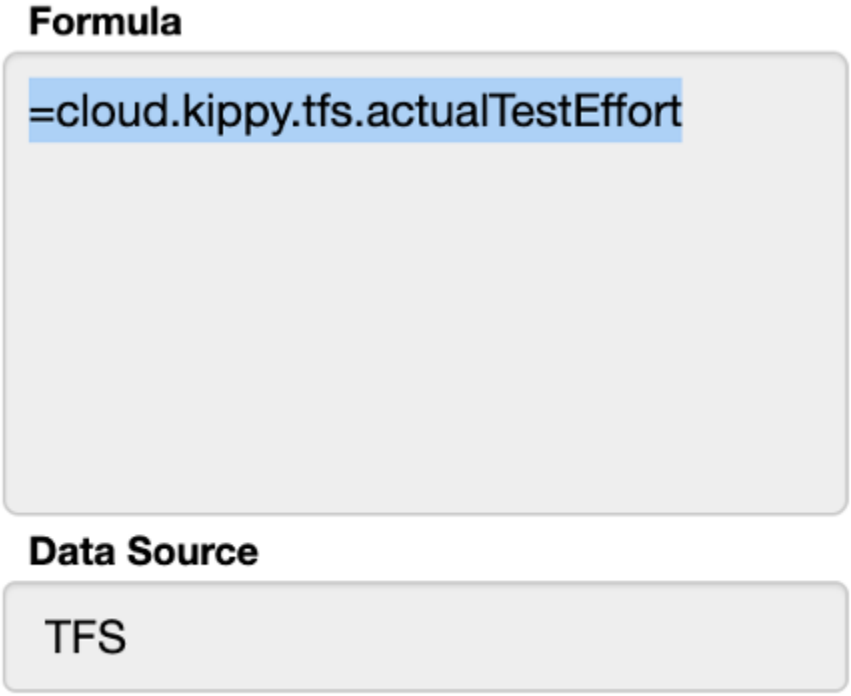
Built-in adapters

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



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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=<period>&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>
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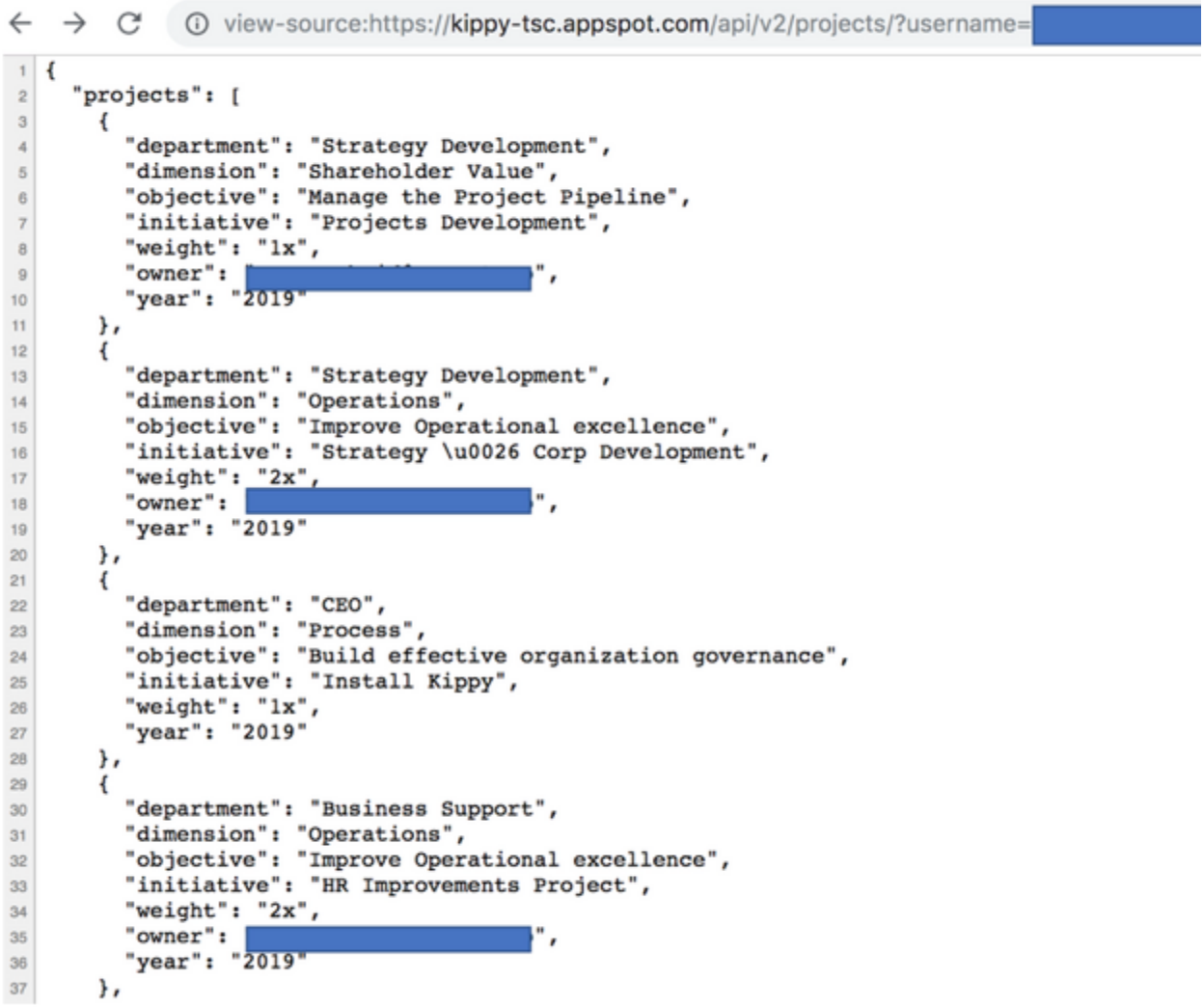

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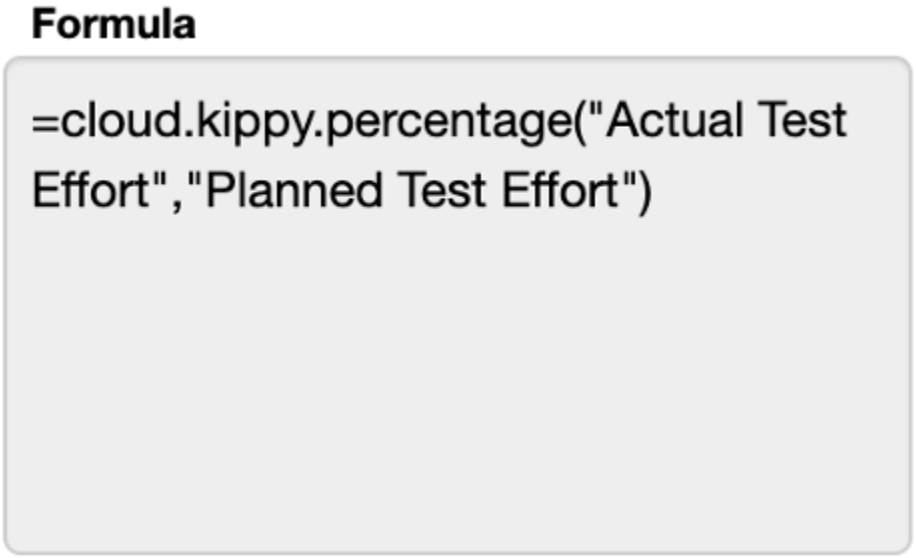
Formulas

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



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).

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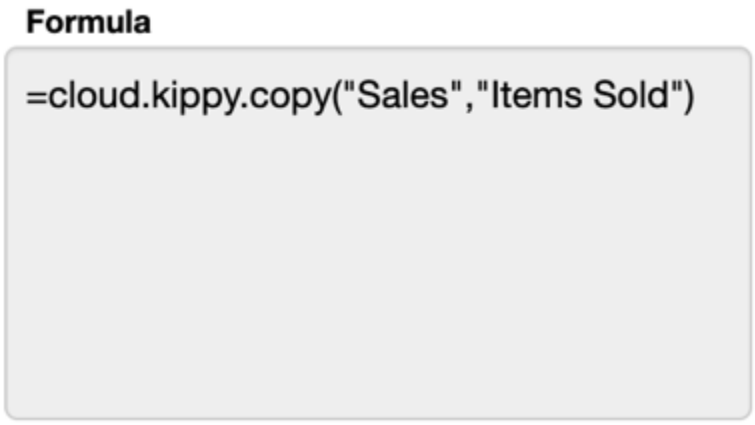

The children formula can be used to sum the actual of all KPIs with the name *kpiName* in the current team's direct sub-teams (i.e. one level below) e.g. =cloud.kippy.children.sum("*kpiName*")

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

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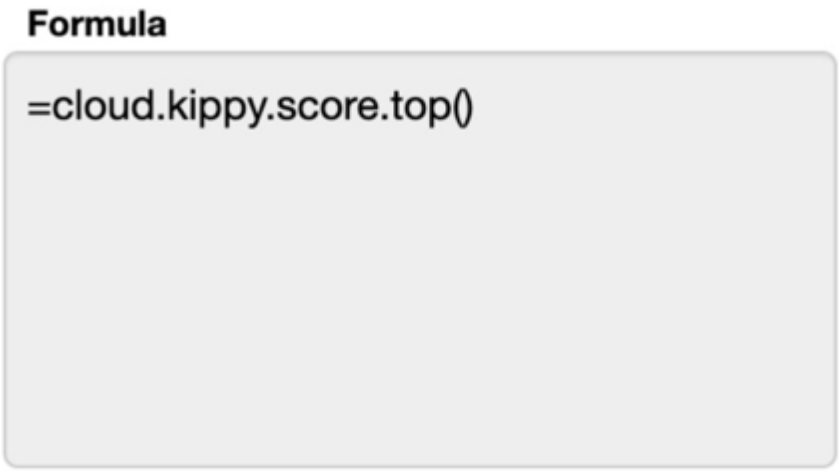
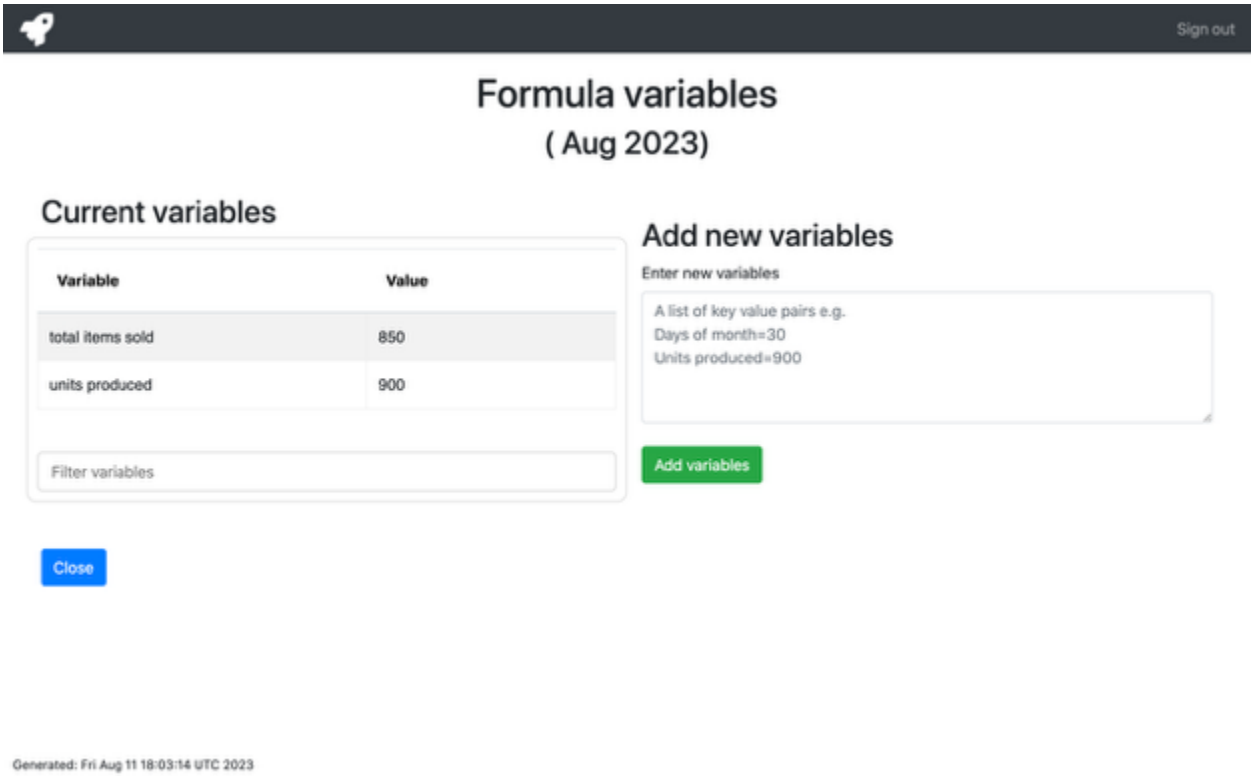


Formulas will turn red if they fail validation. More detail here: https://www.kippy.cloud/formula

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.



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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.

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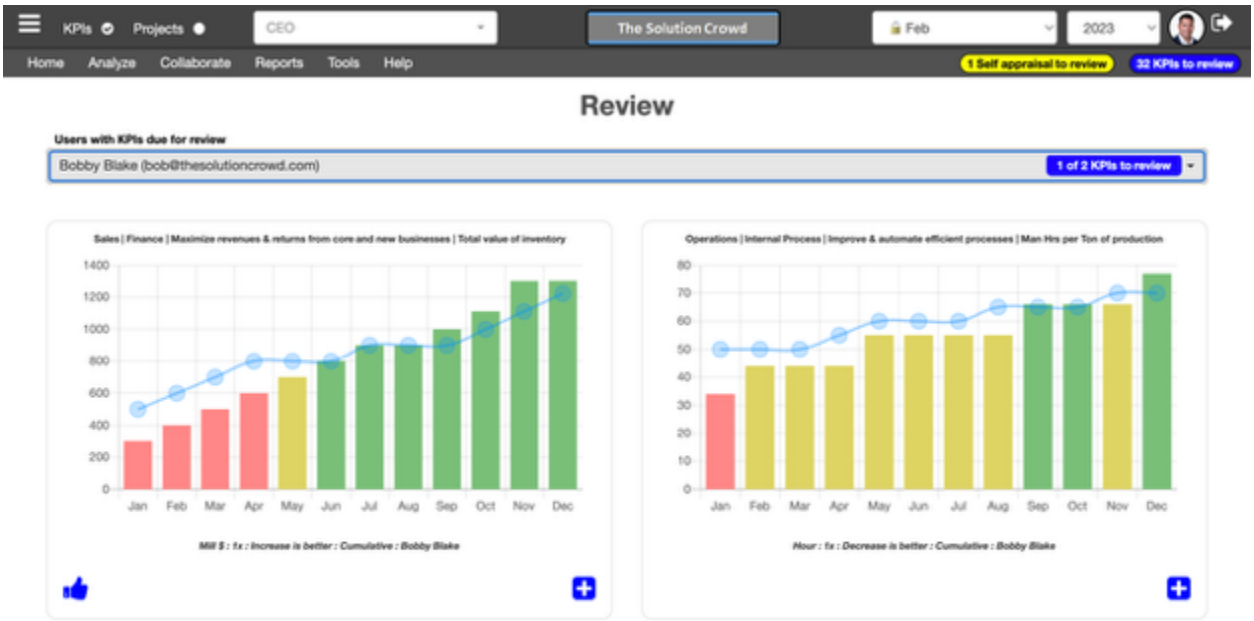
Reviewing actuals

Manager UI

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



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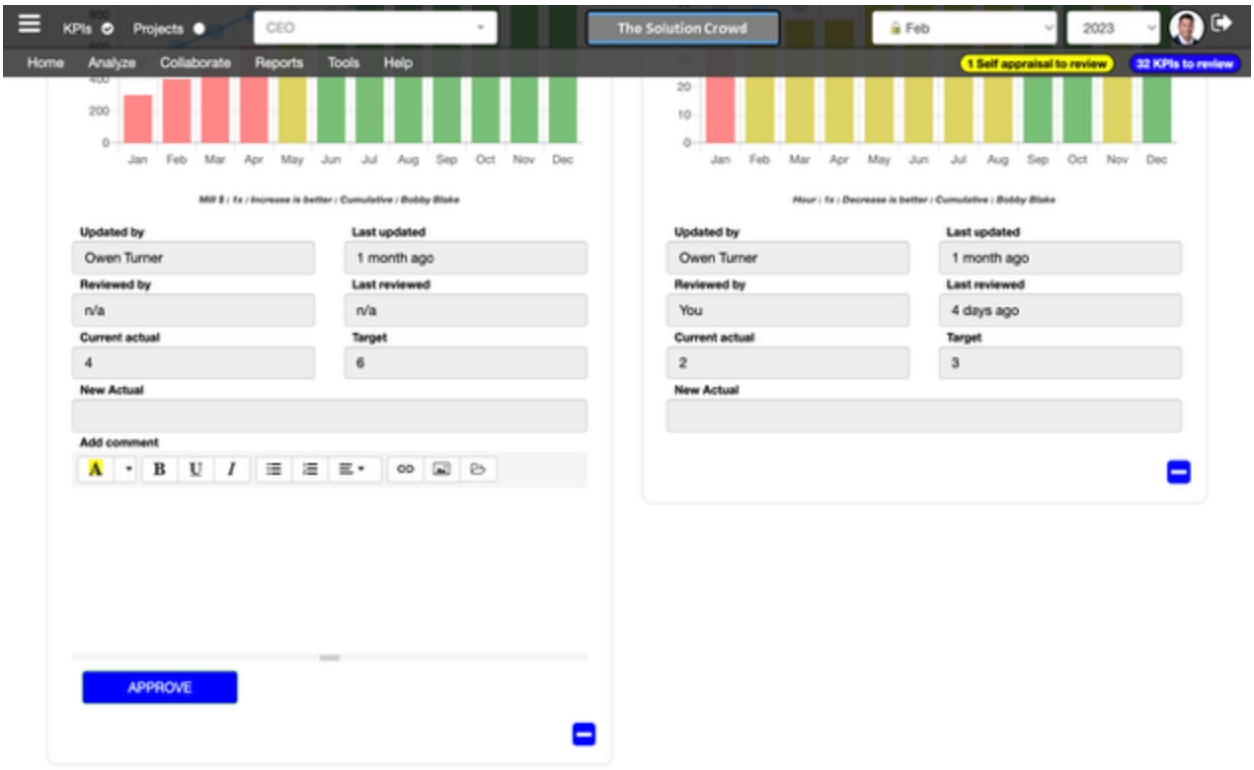

Managers can quick approve with a single click, approve with notes, and adjust (with/without notes).

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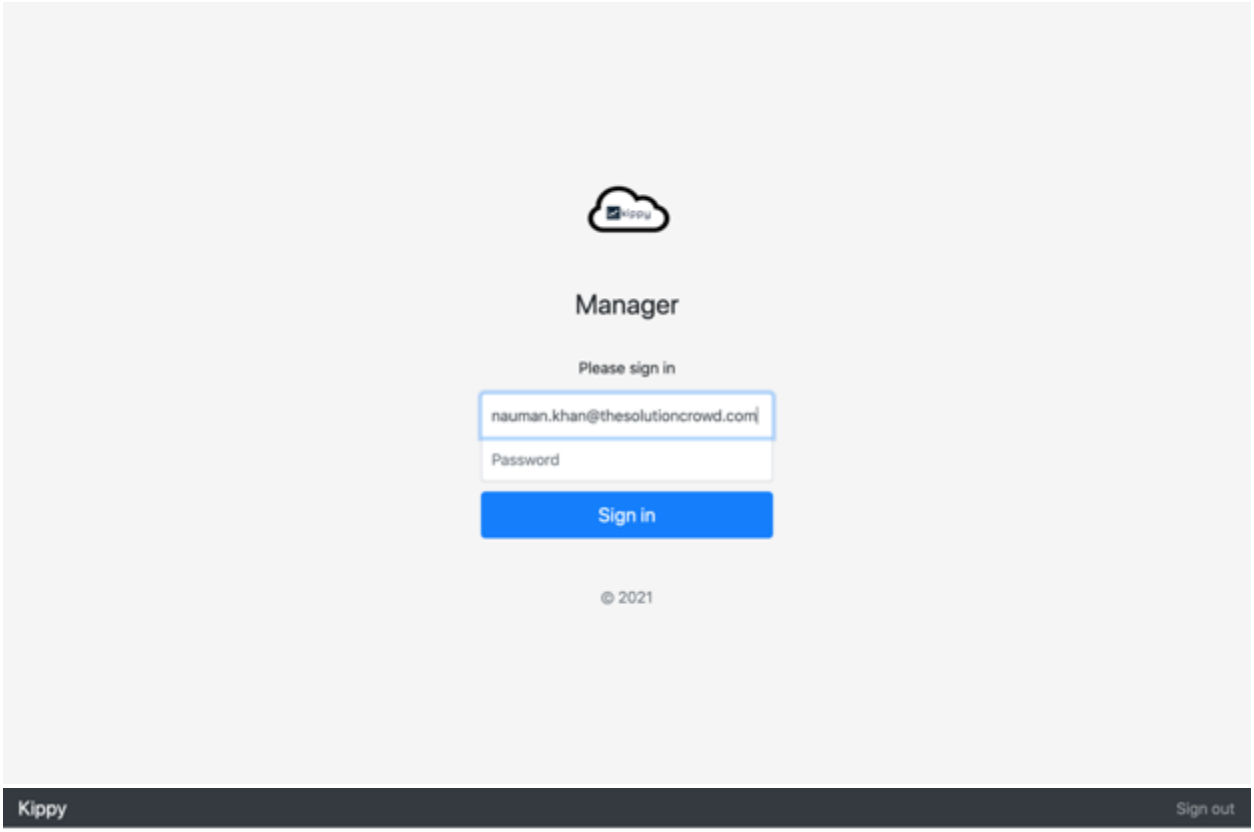
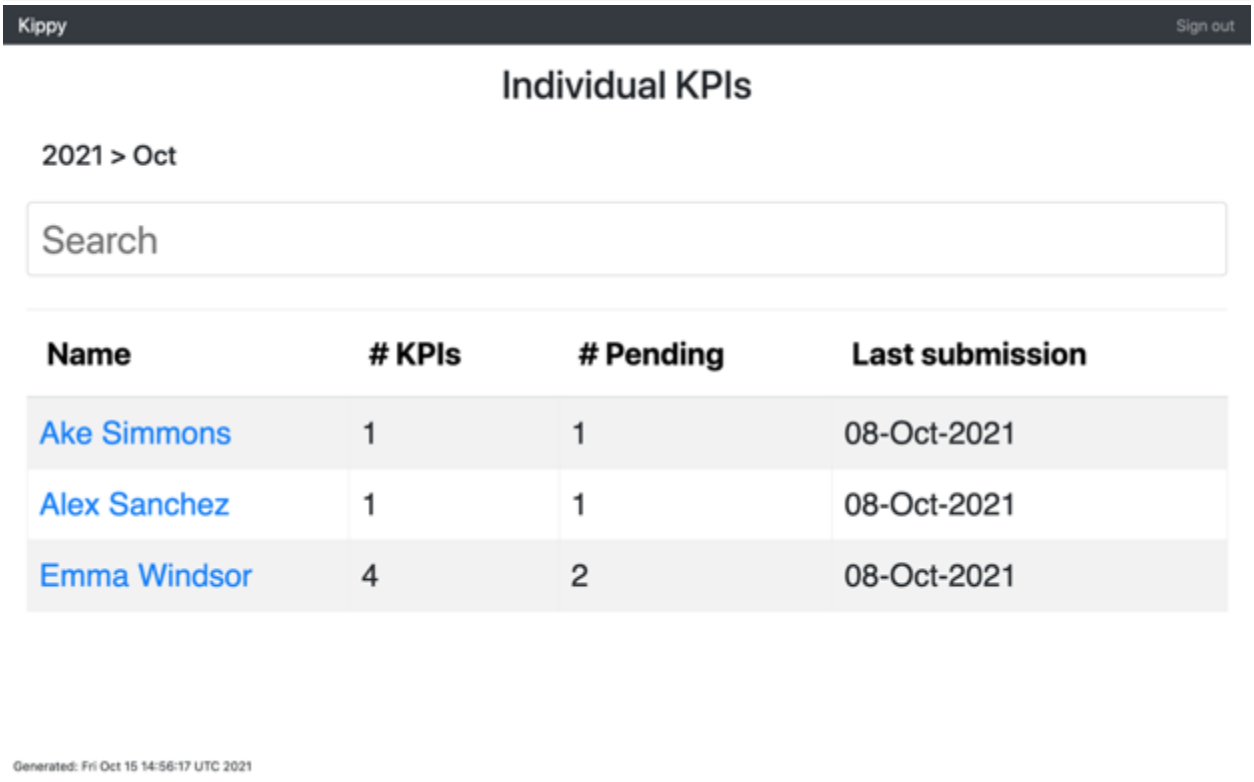
Manager approval microapp

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





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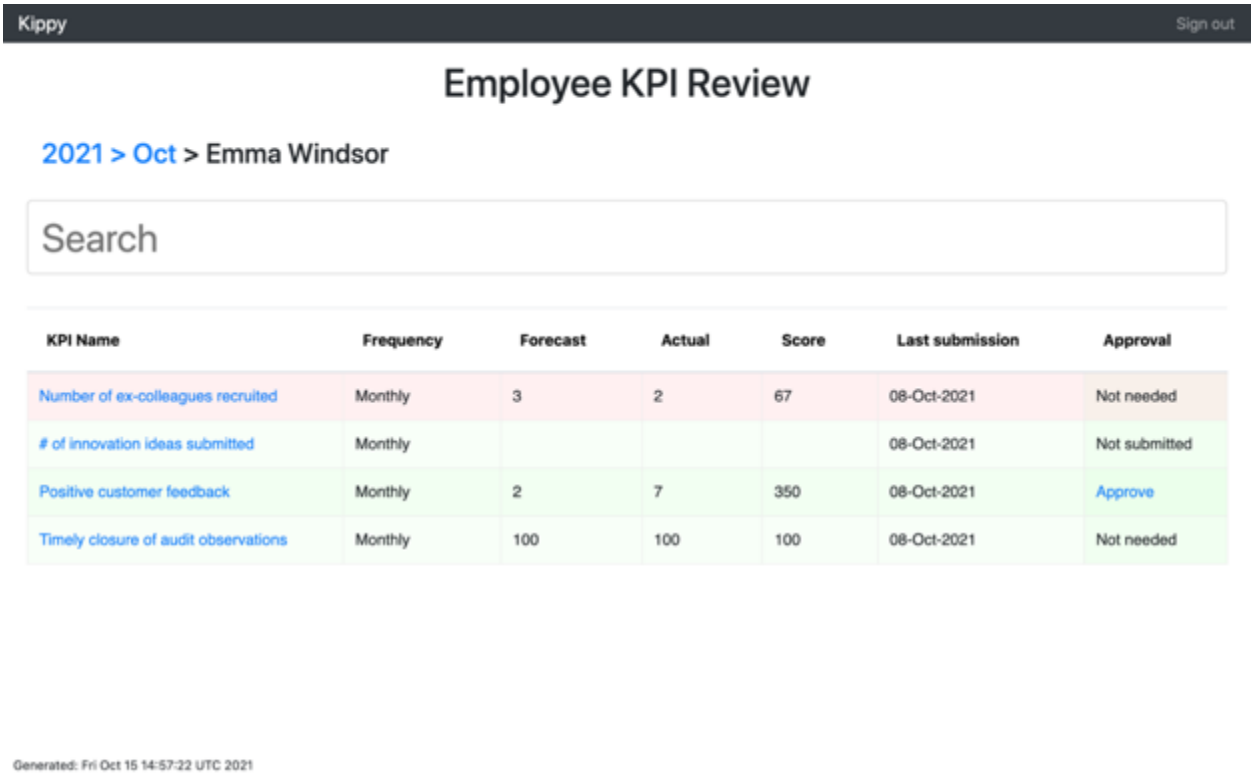

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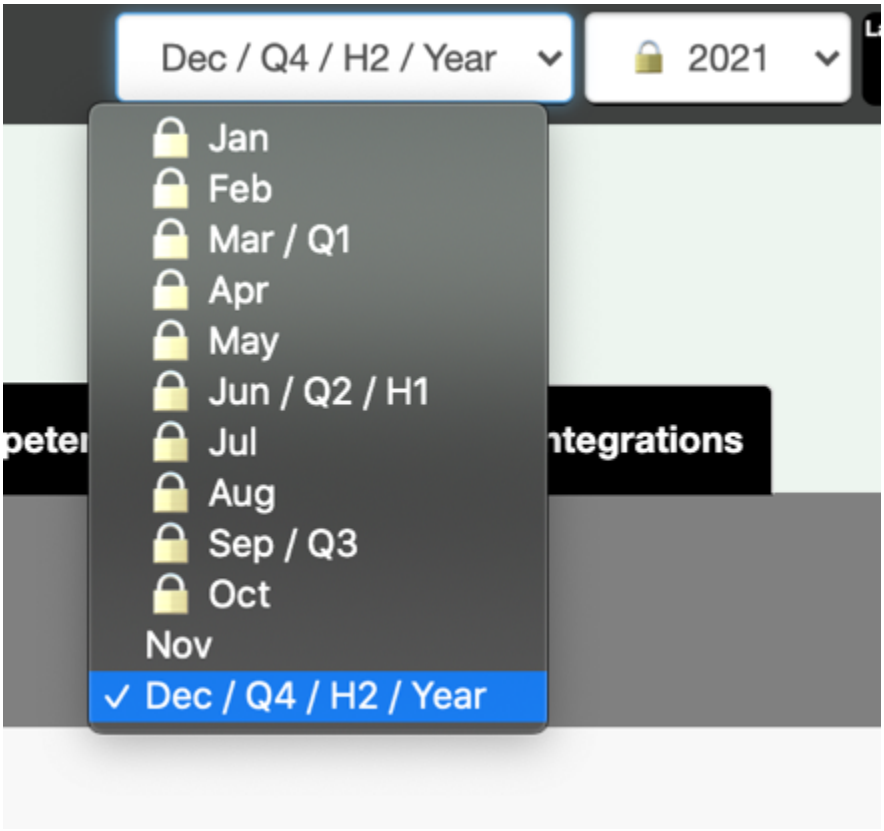
History

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



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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.

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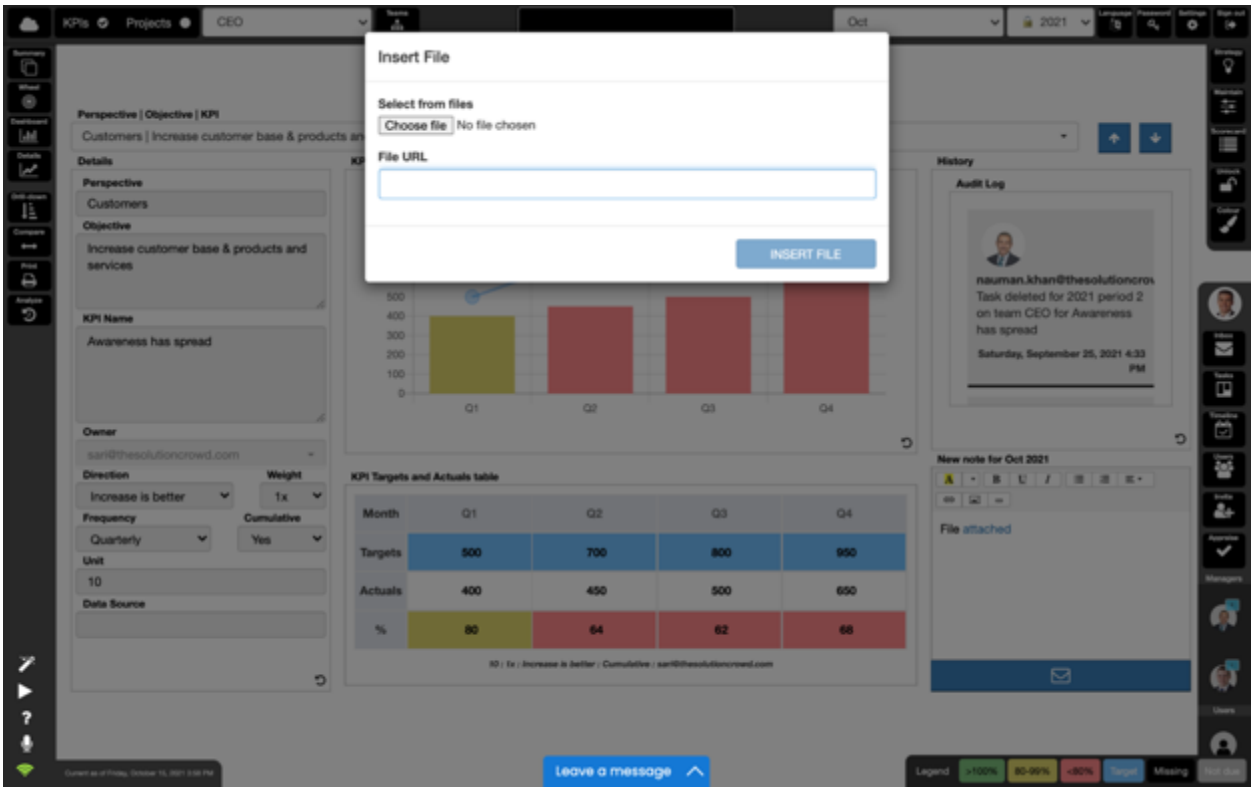

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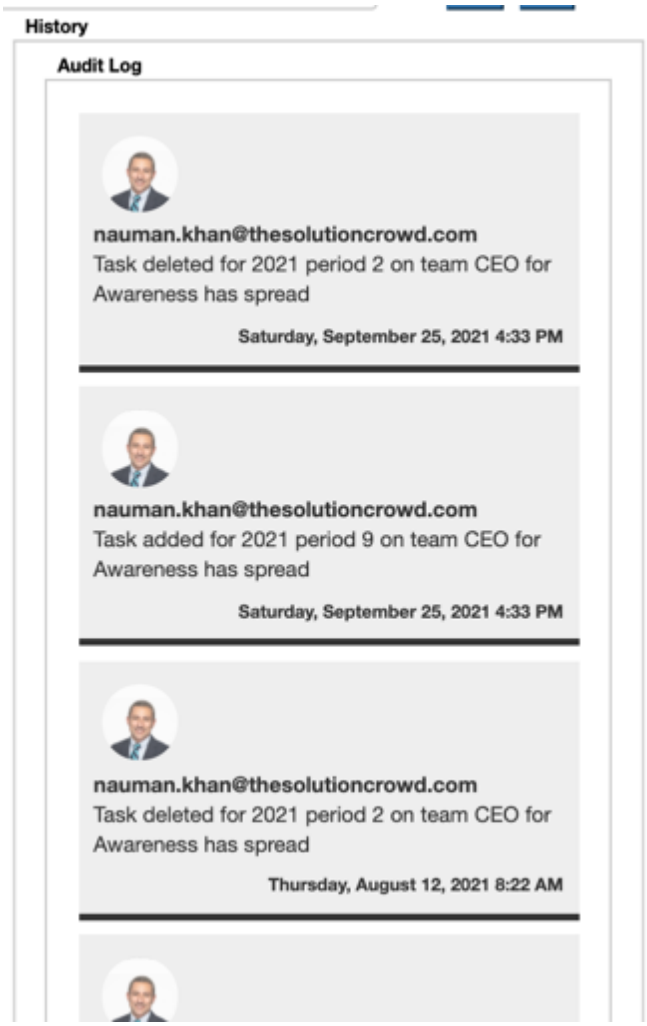

Mentions

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

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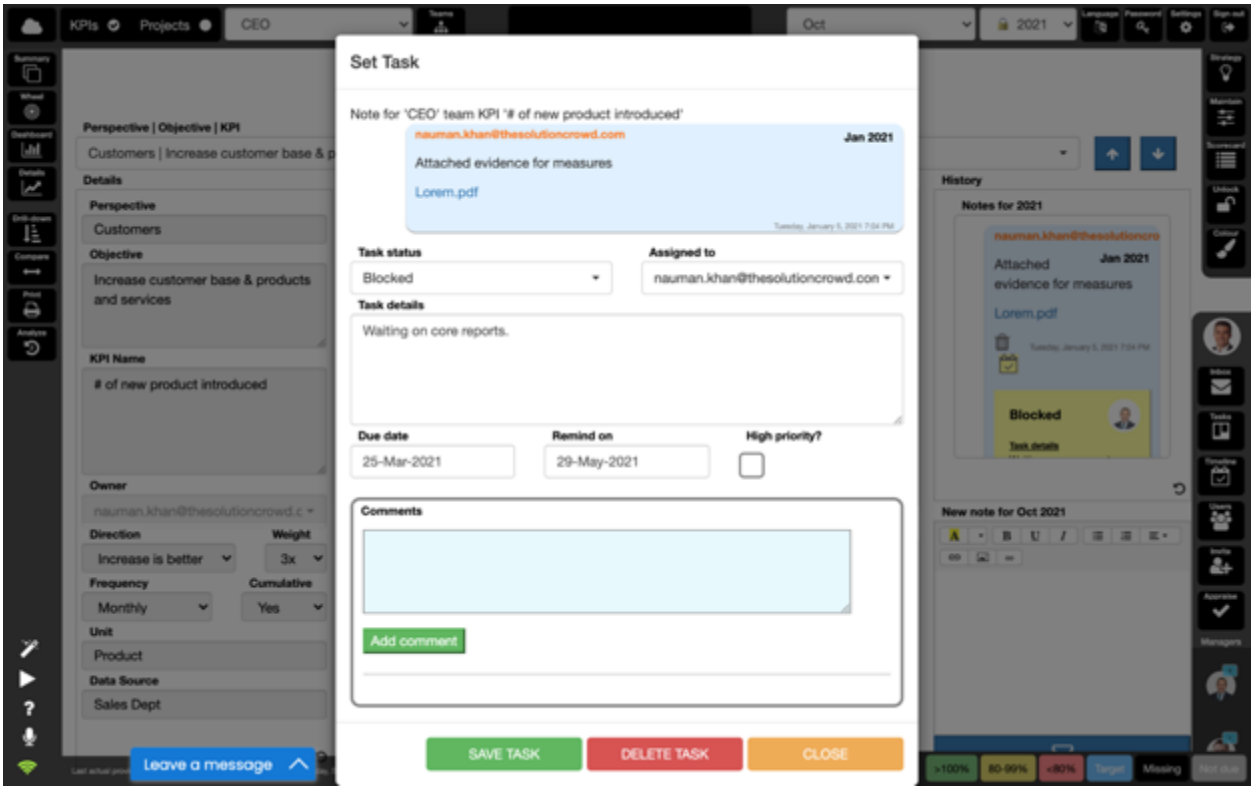
Tasks

Task setting

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



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

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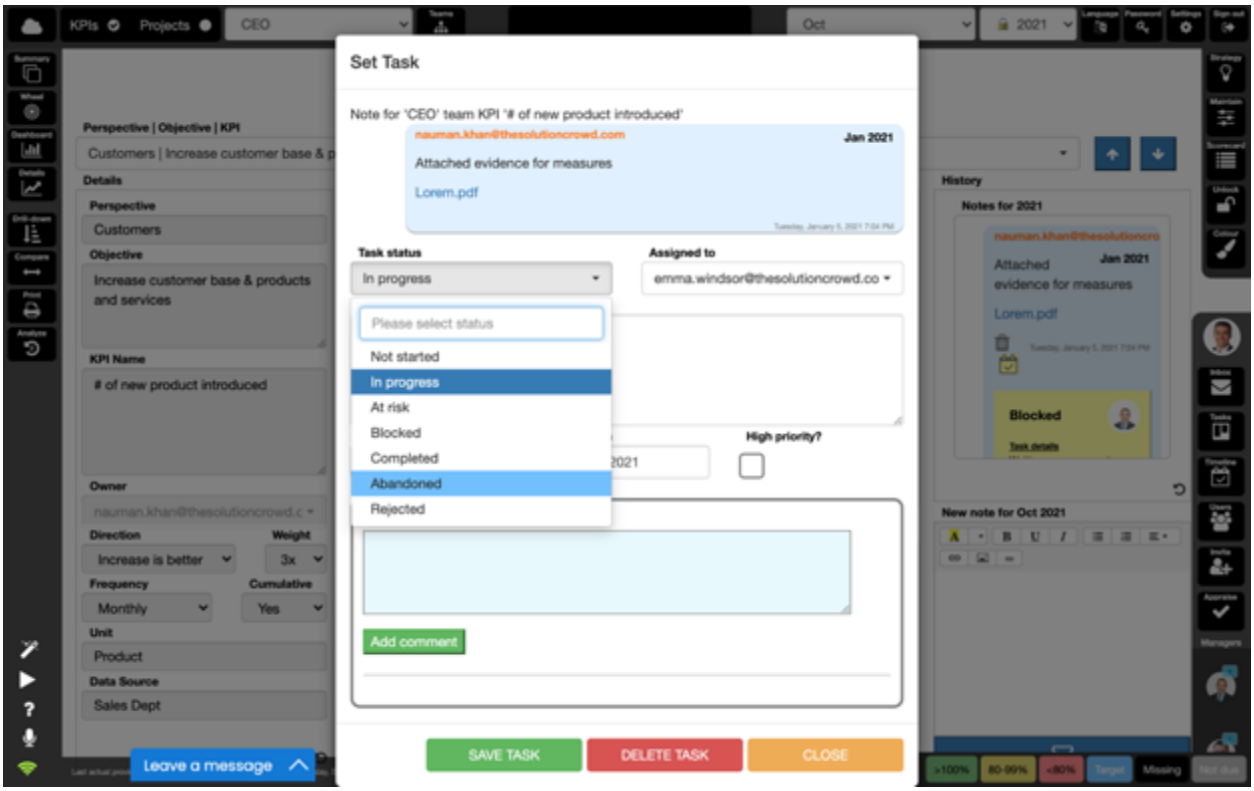
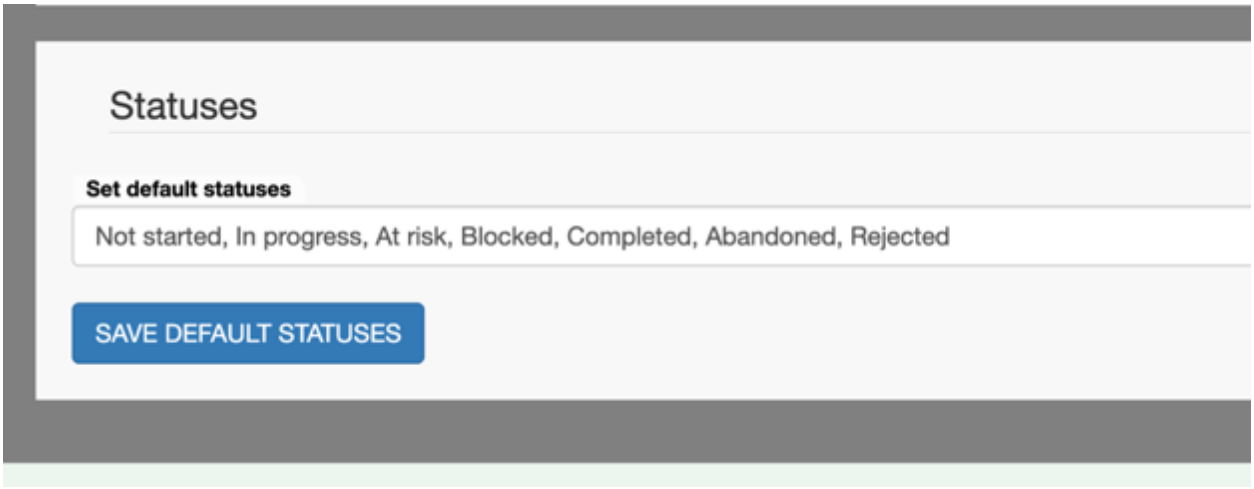


The set of task statuses are configurable.



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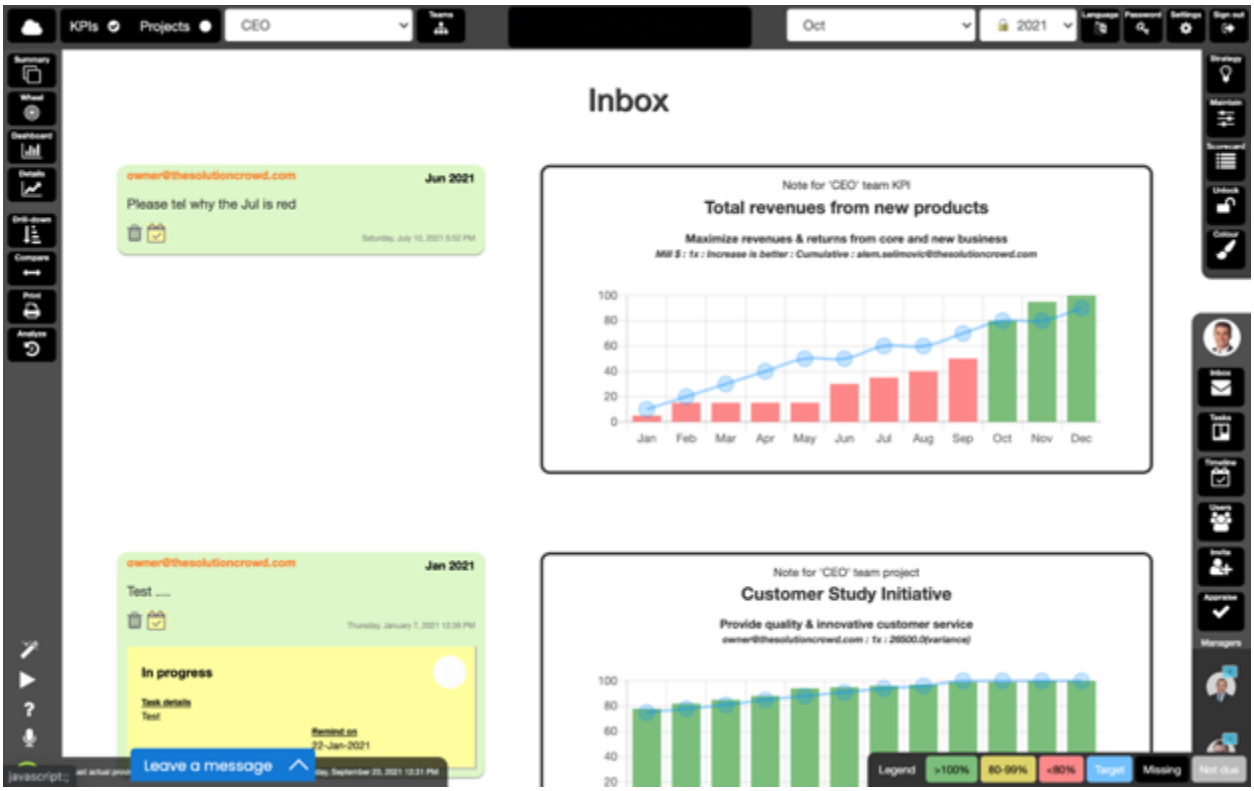
Task viewing

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.



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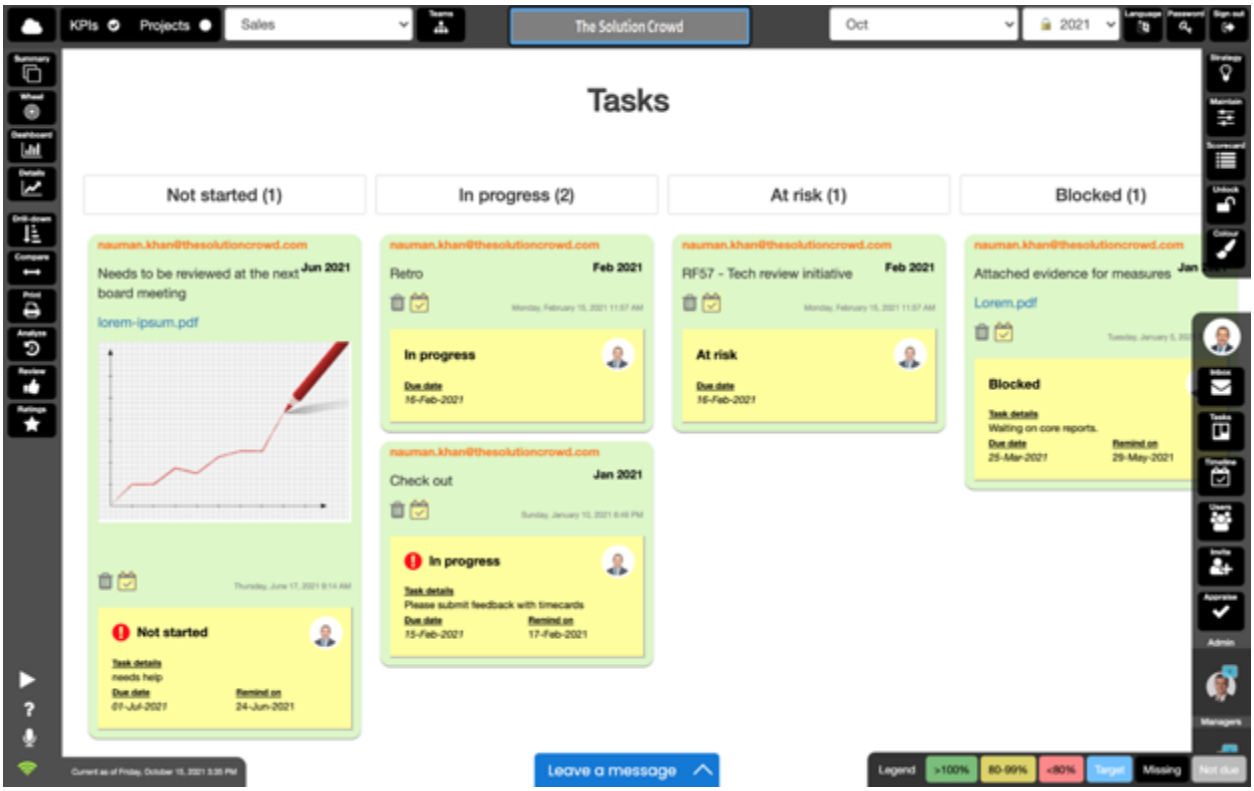
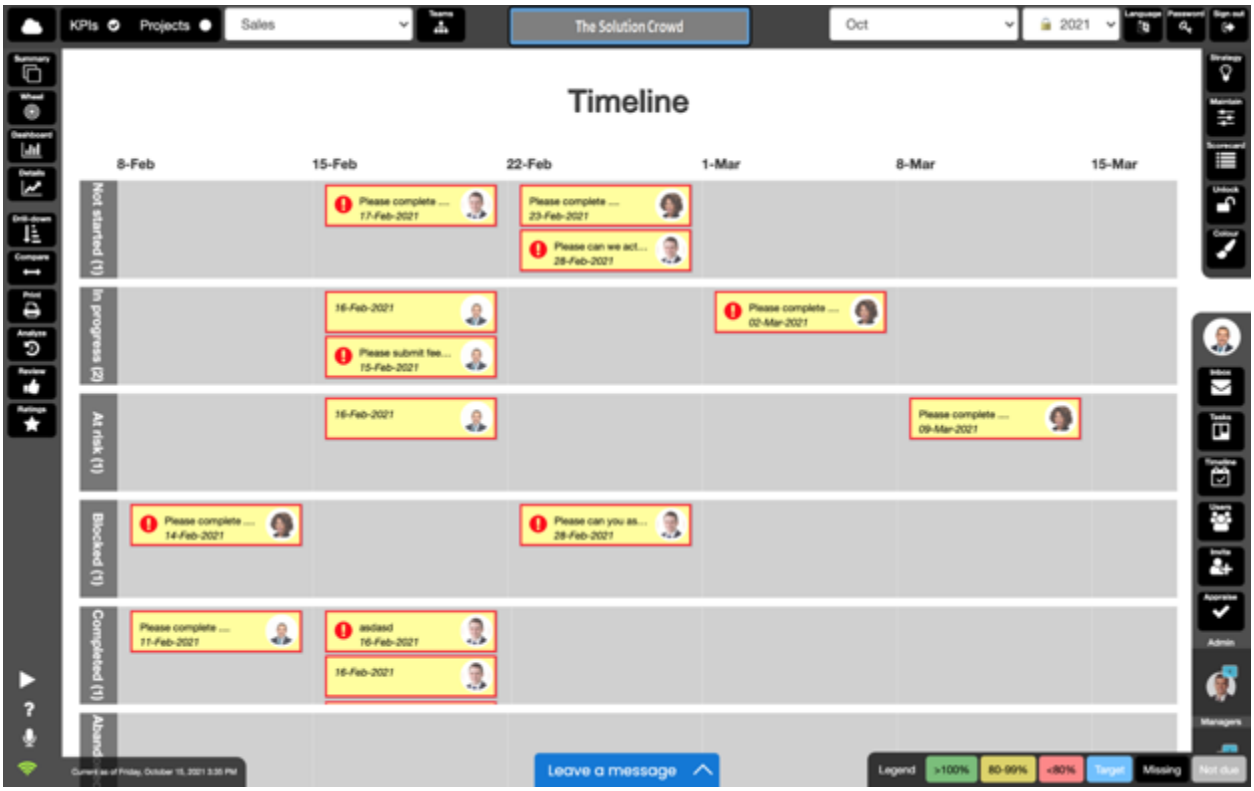


Tasks can be drag and dropped to different statuses in the Tasks screen.



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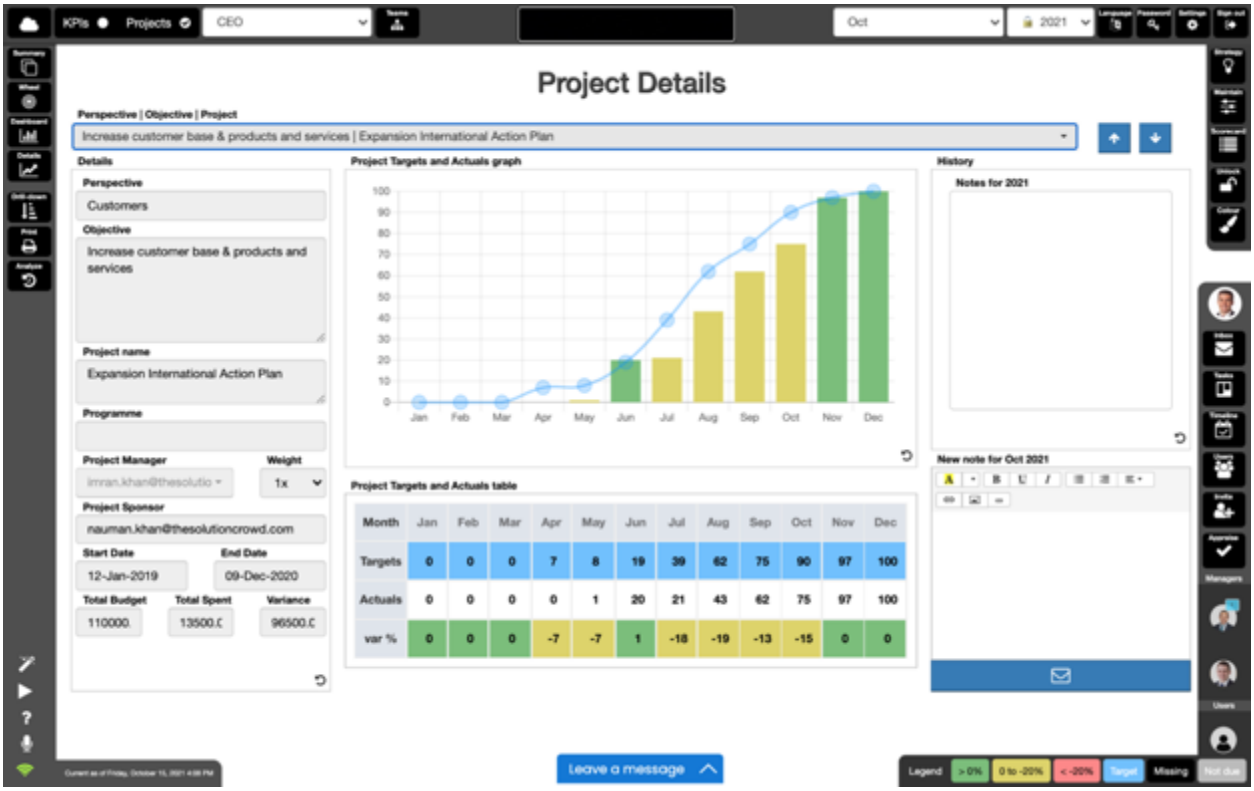
Projects

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



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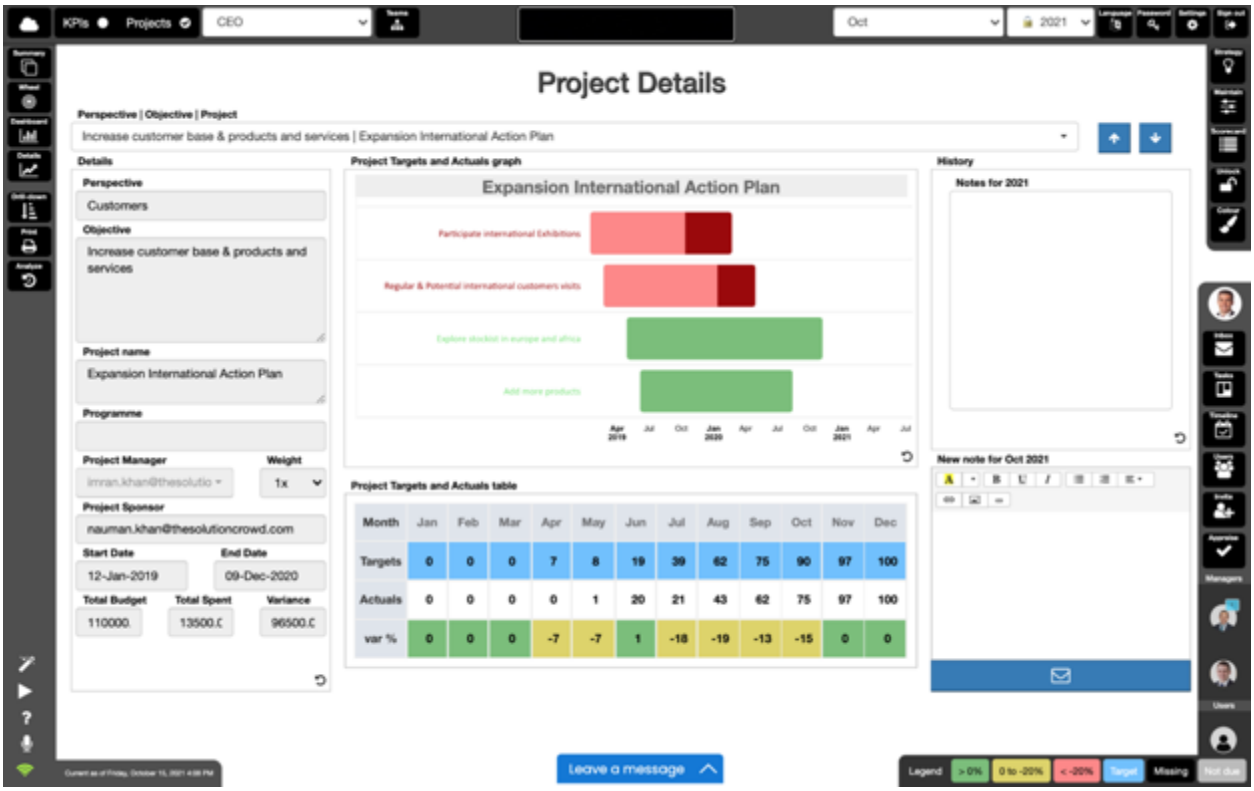

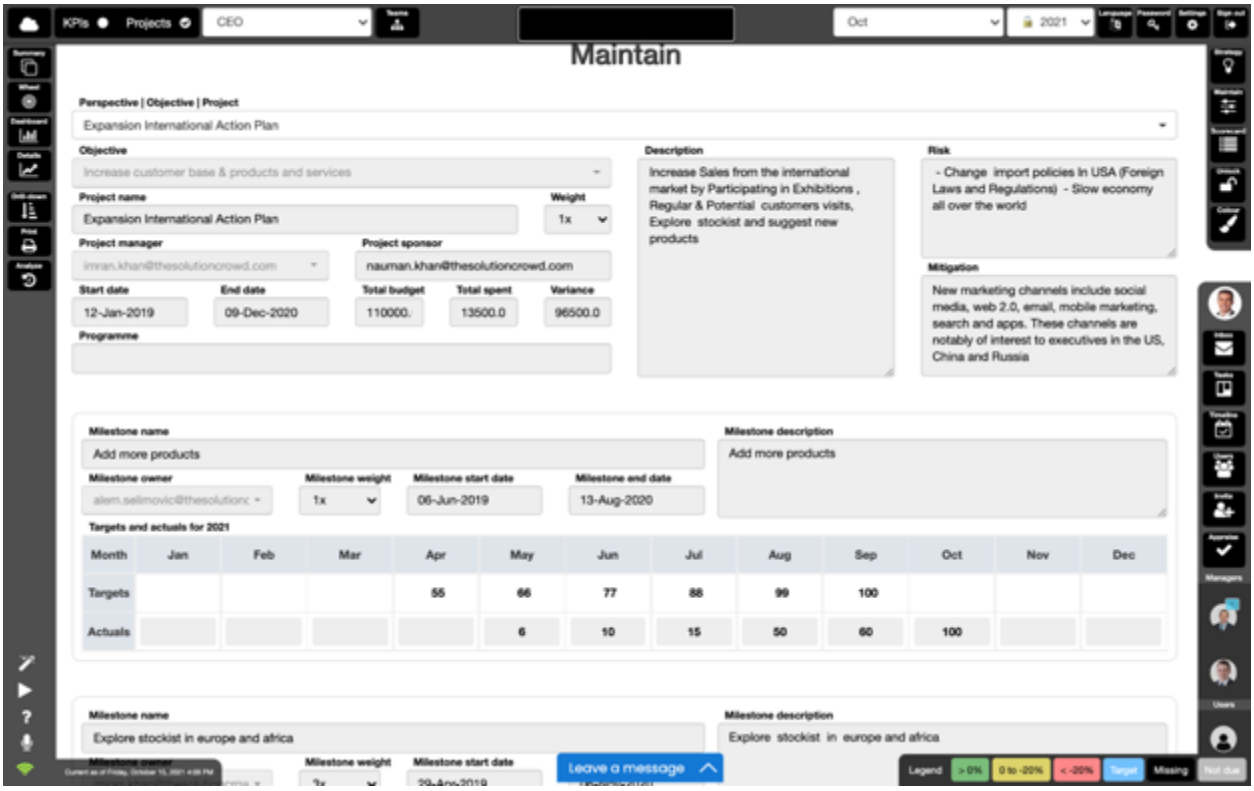

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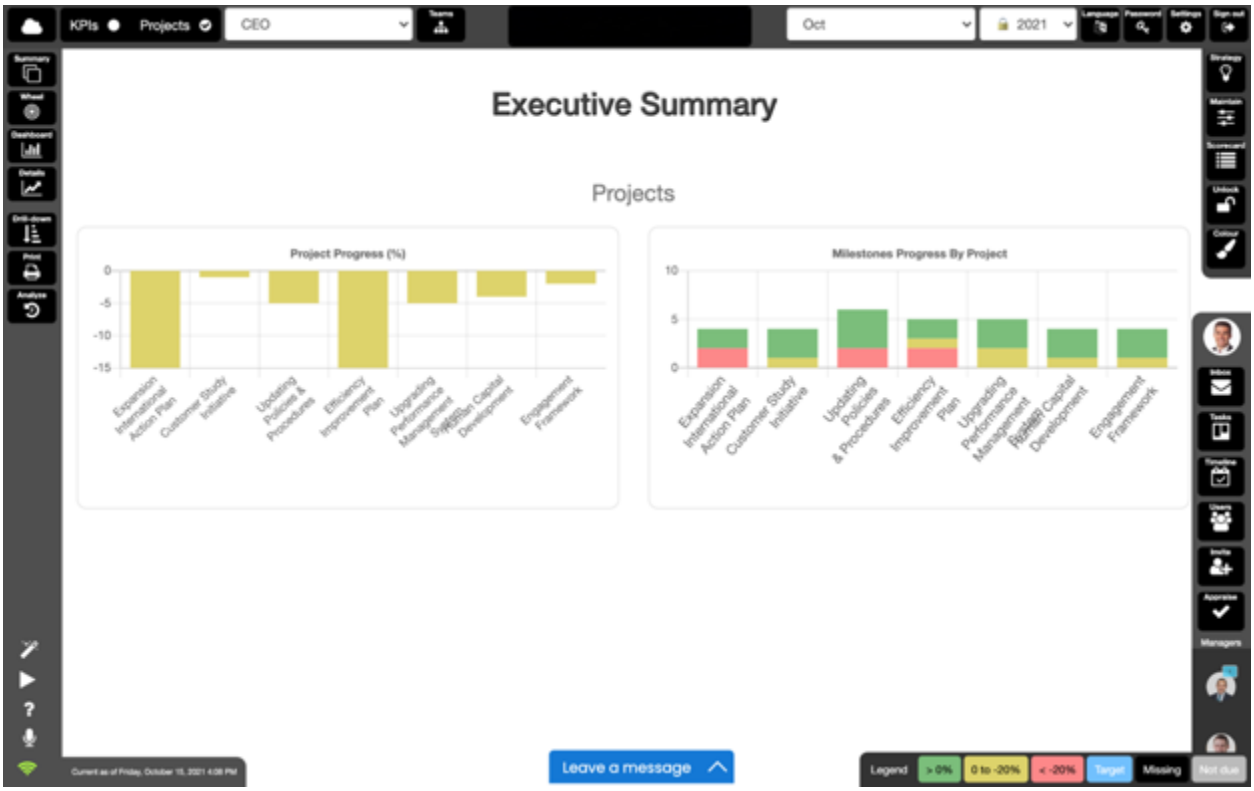
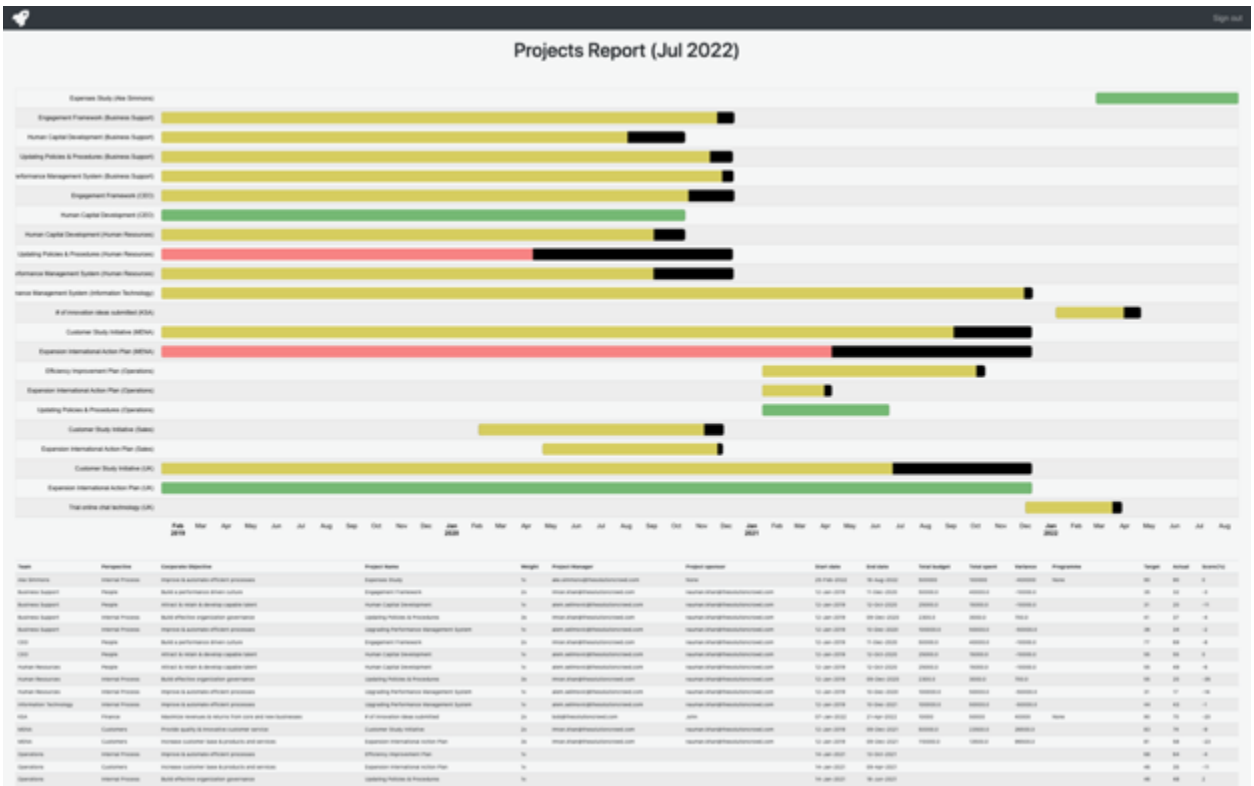


The Projects microapp summarizes all projects and project performance on a Gantt chart.



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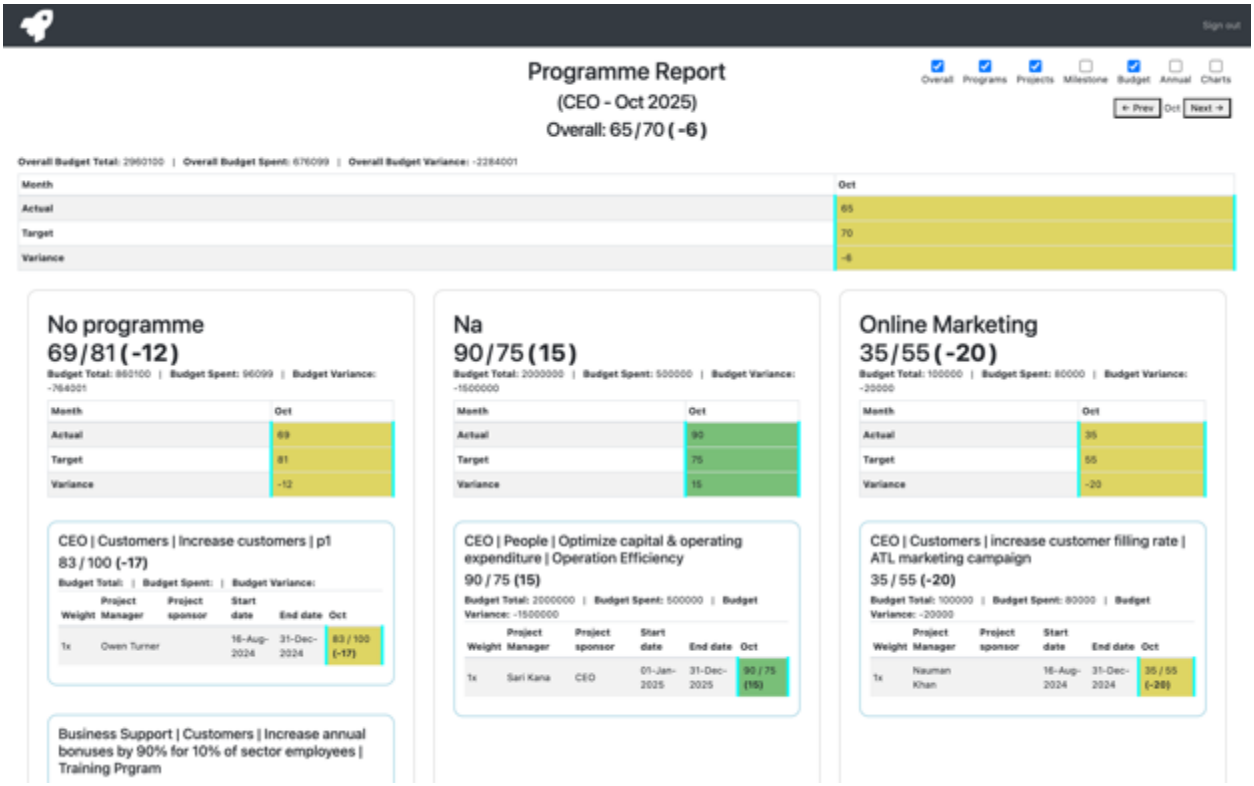
Programmes

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.

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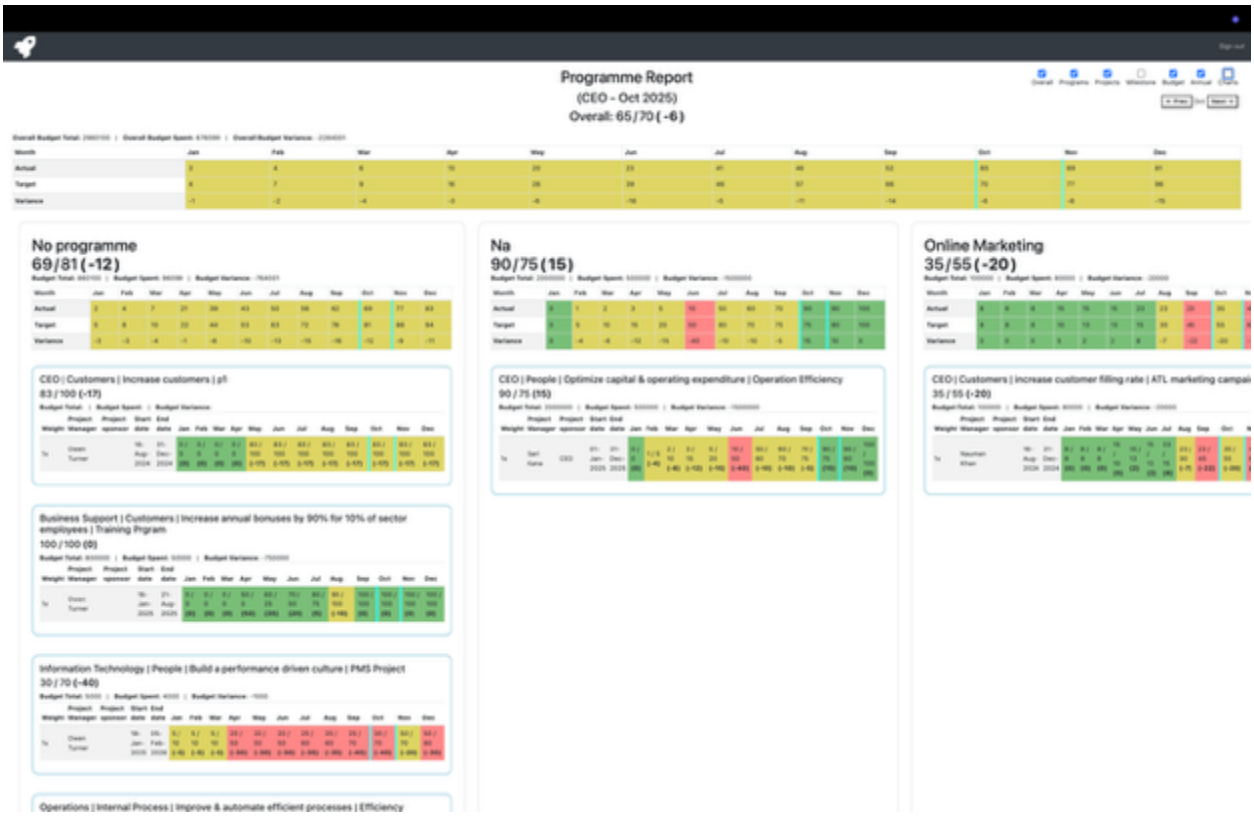

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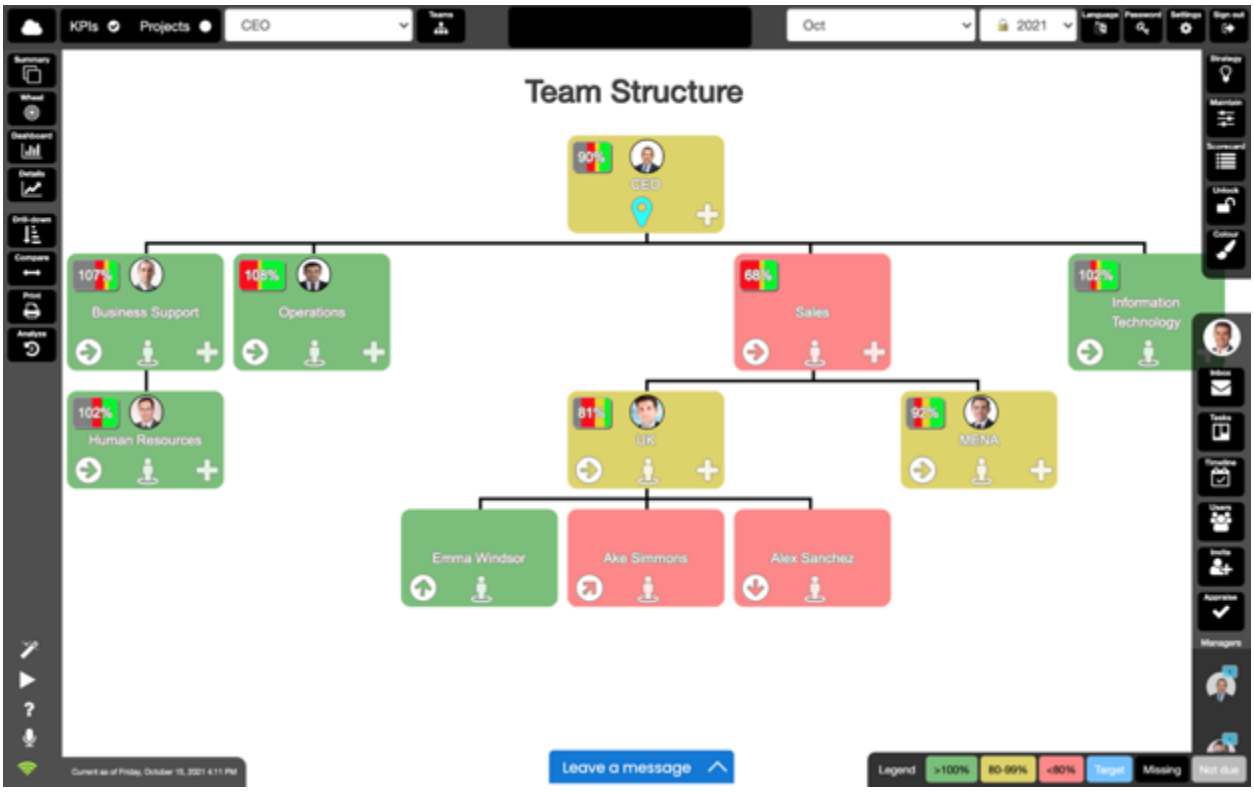
Live dashboards

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.



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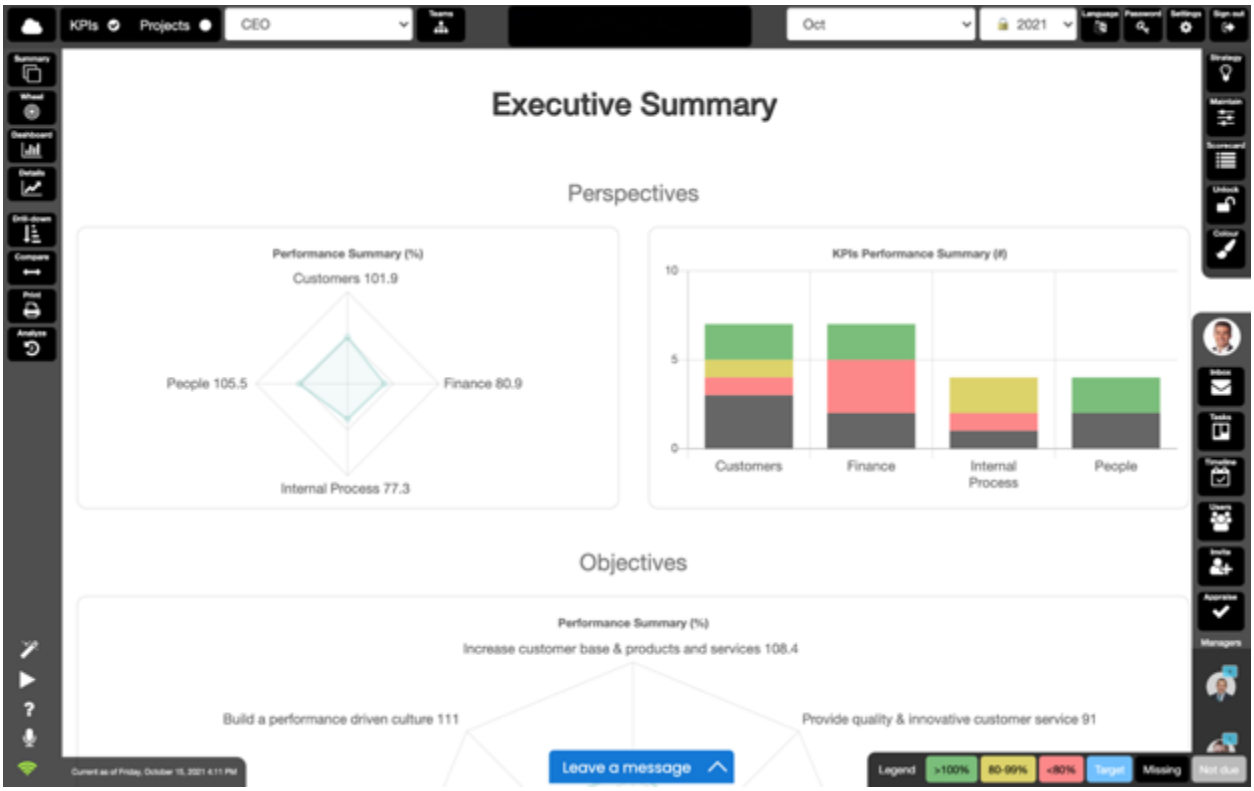

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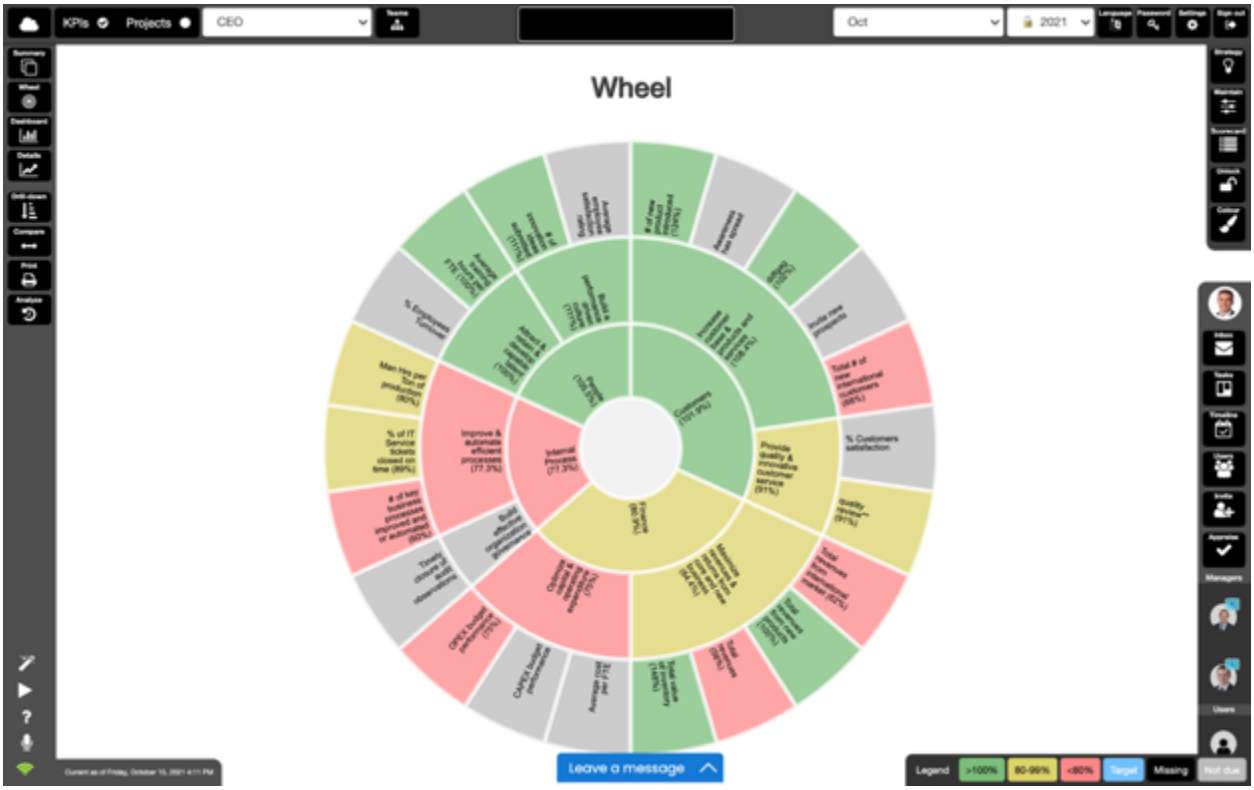

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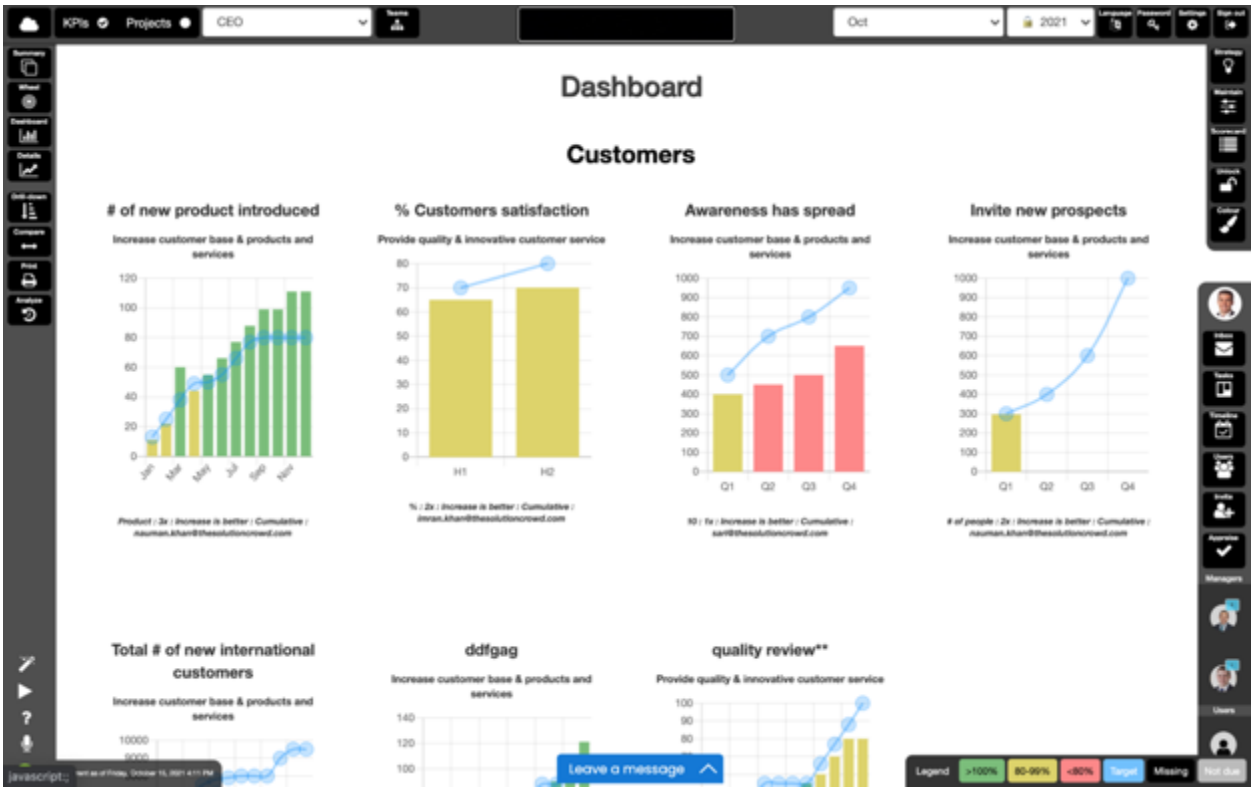

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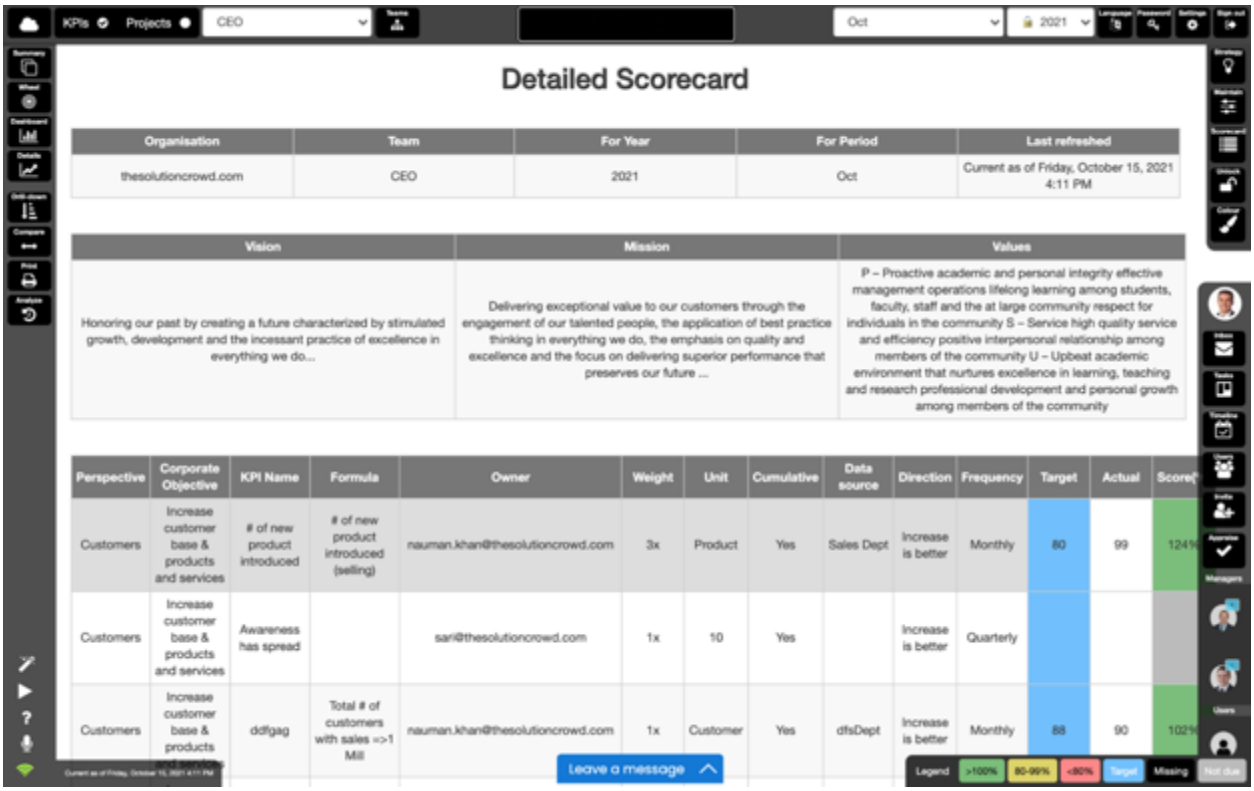

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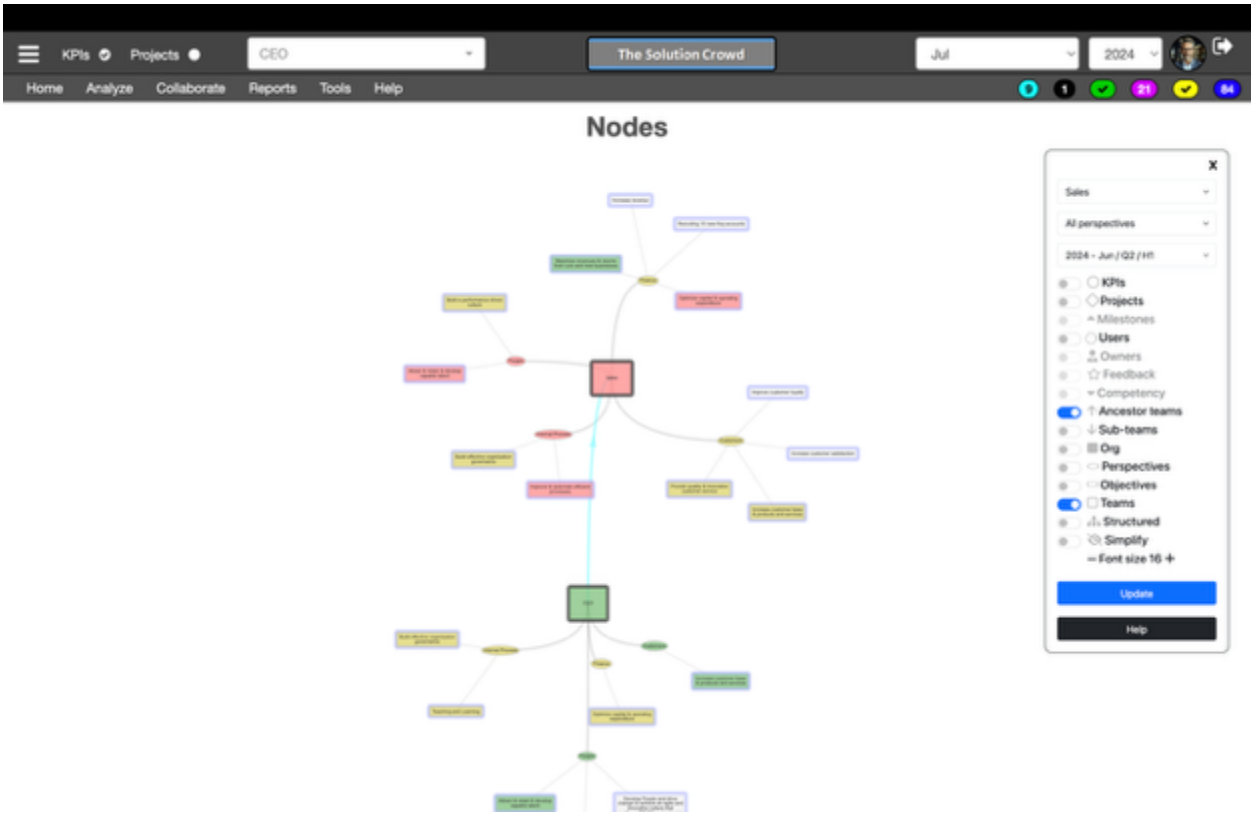
Analyze

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.

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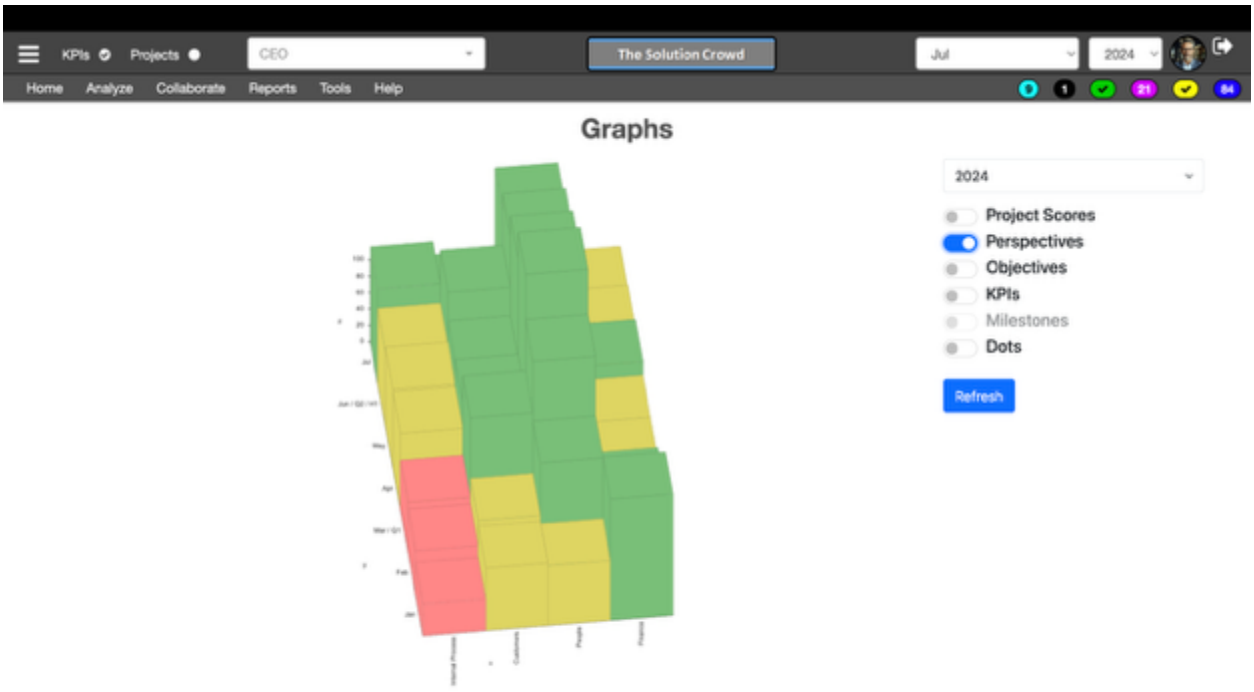

Drag with your mouse to change the perspective. Hover over the filters to learn more.

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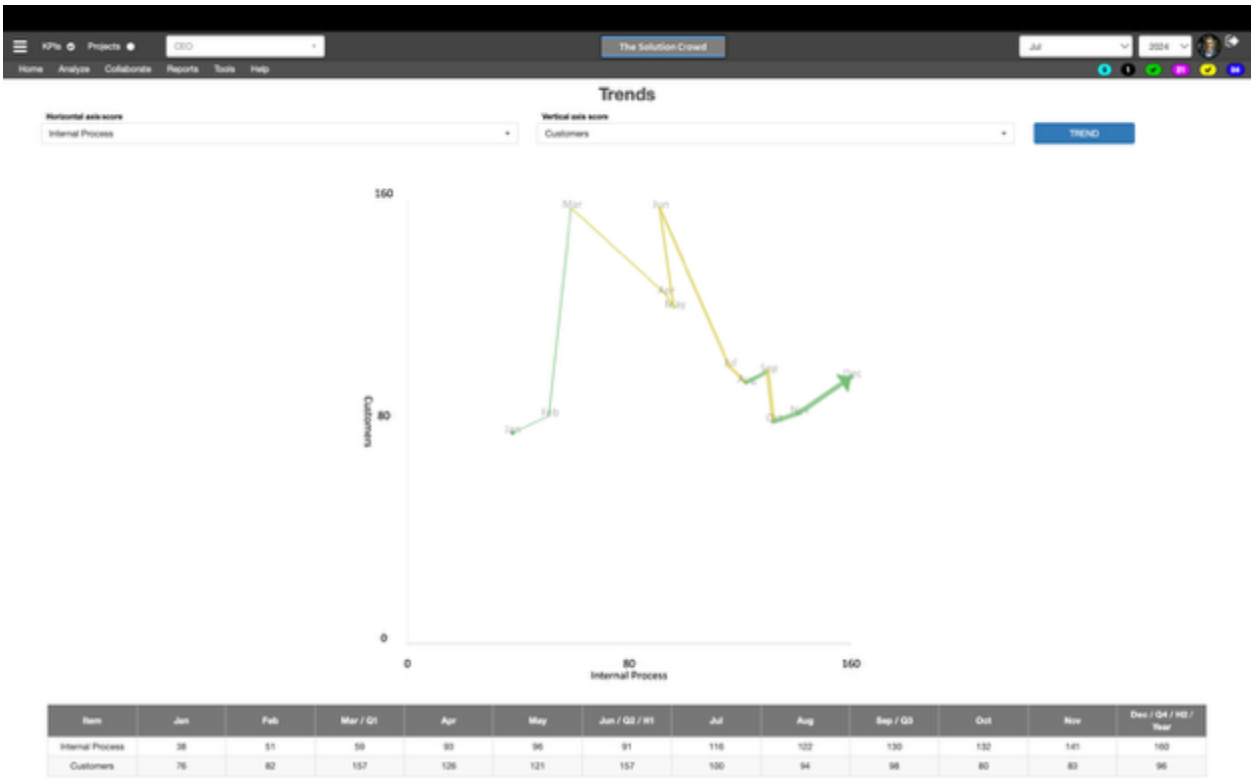
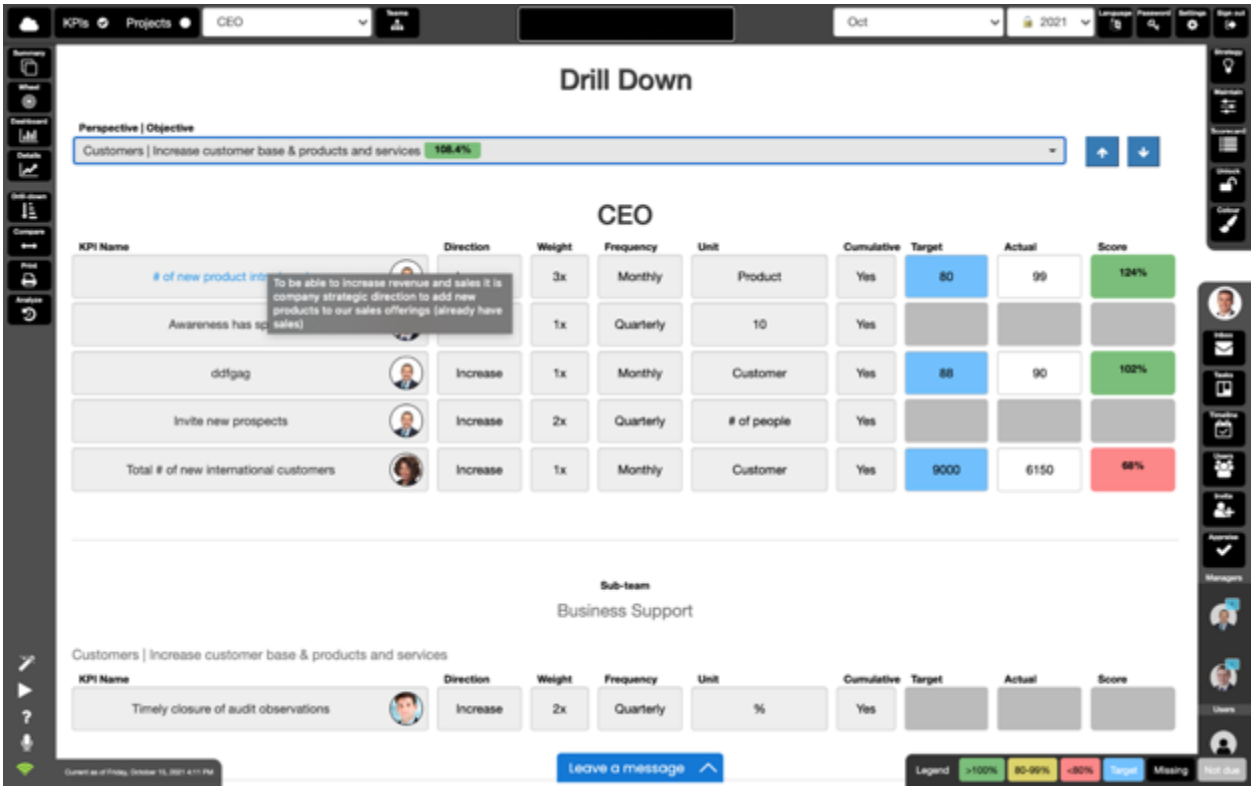


Compare how two items are trending over the year.



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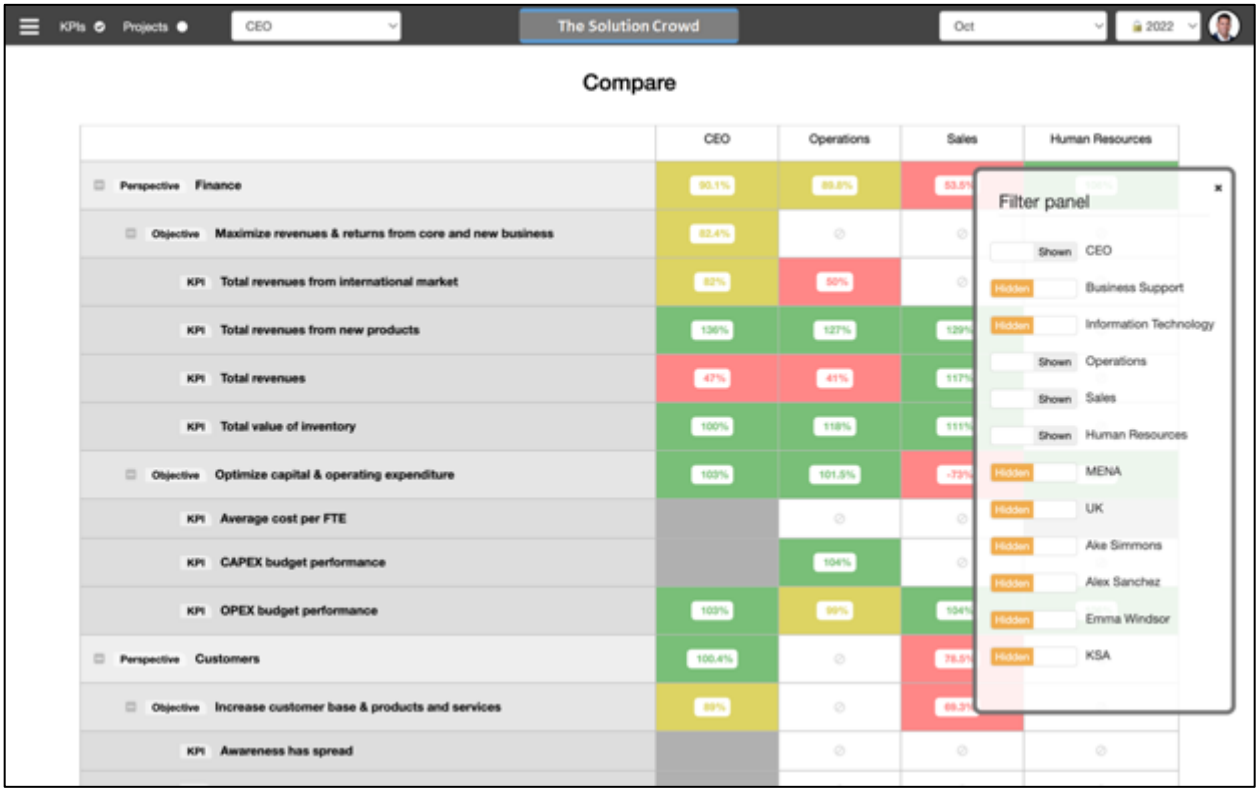
Check performance of your objective, by the vertical alignment of sub-objectives down the organisation.



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

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Strategy map

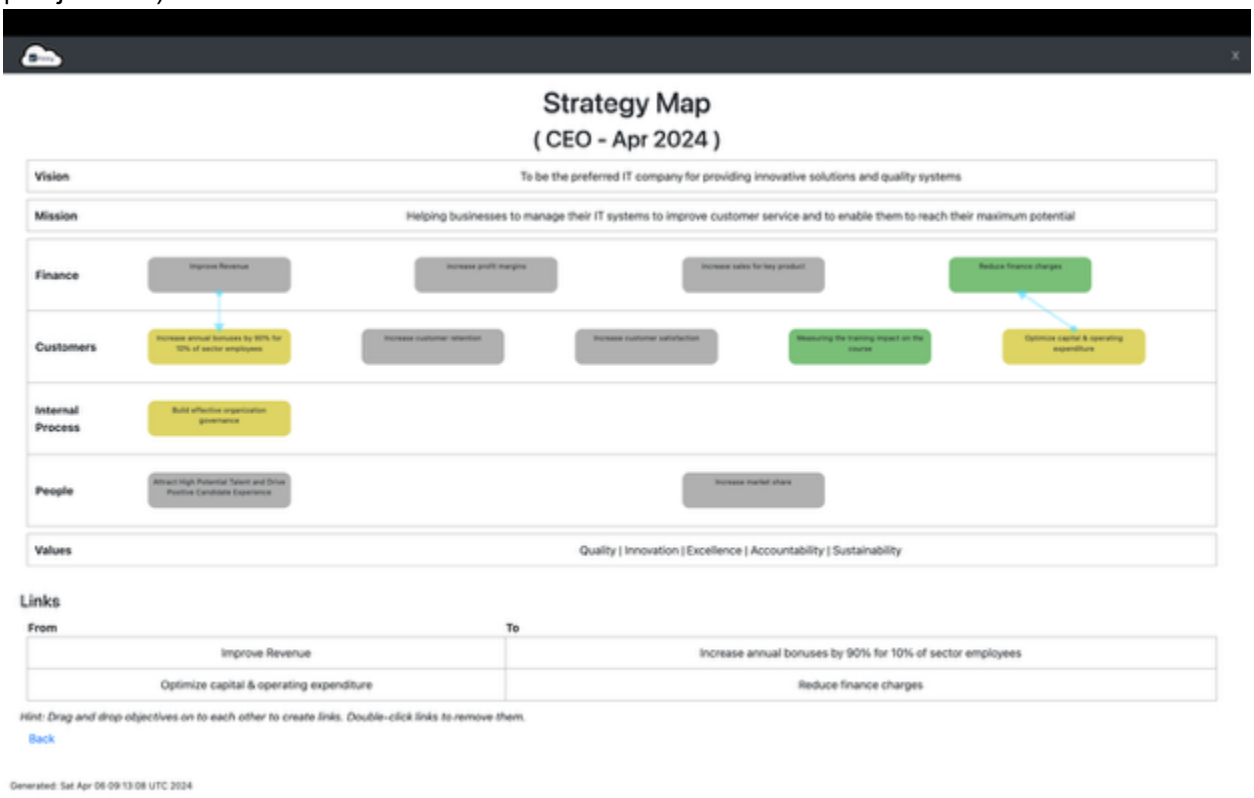
View the org wide stragtegy on a strategy map.

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

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

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

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



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Work list

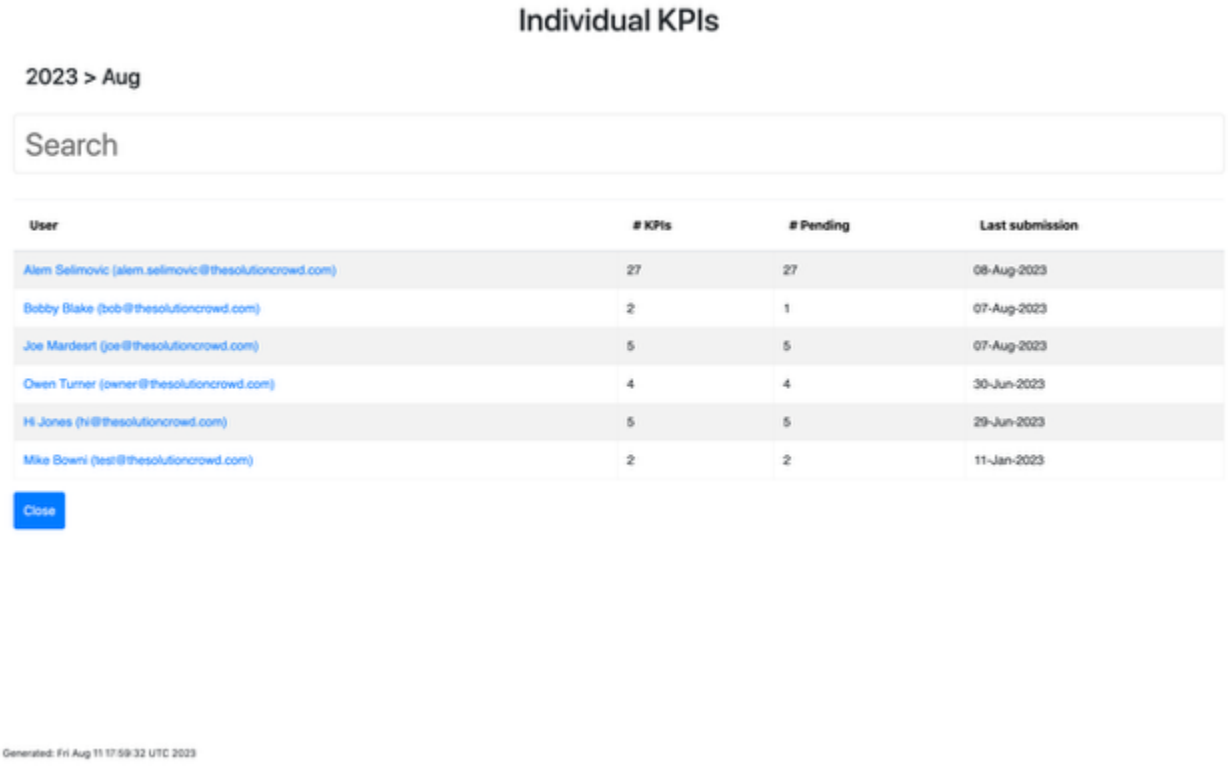
Quick links to action items for your attention.

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.



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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 Mil	Monthly	13	9	69	16-May-2023	Approve
UK	# of customers with sales more than 1 Mil	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	129	14-Jul-2023	Approve
CEO	Customer Acquisition Rate	Monthly	8	7	87	14-Jul-2023	Approve
CEO	Customer Churn Rate	Monthly	8	6	133	14-Jul-2023	Approve
CEO	Customer Lifetime Value (CLV)	Monthly	10000	9744	97	14-Jul-2023	Approve

Generated: Fri Aug 11 17:59:01 UTC 2023

Approve Draft KPIs

Search

Approval	Edit	Delete	Team	Perspective Name	Objective Name	KPI Name	Frequency	Owner	Unit	Weight	Direction	Cumulative	Description	Formula	Data Source
Approve	Edit	Delete	KSA	Customers	Increase customer base & products and services	# of customers with sales more than 1 Mil	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 Mil	Sales Dept
Approve	Edit	Delete	Ake Simmons	Customers	Increase customer base & products and services	# of customers with sales more than 1 Mil	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.

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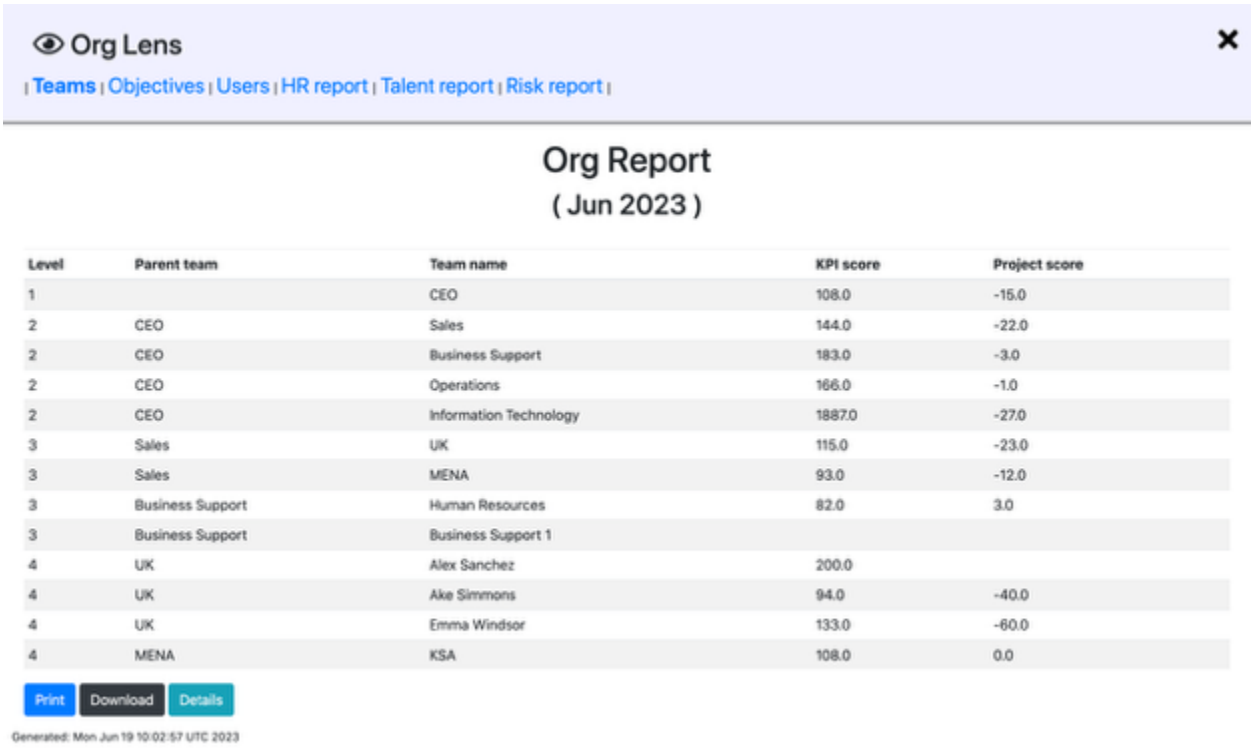
Quick links

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



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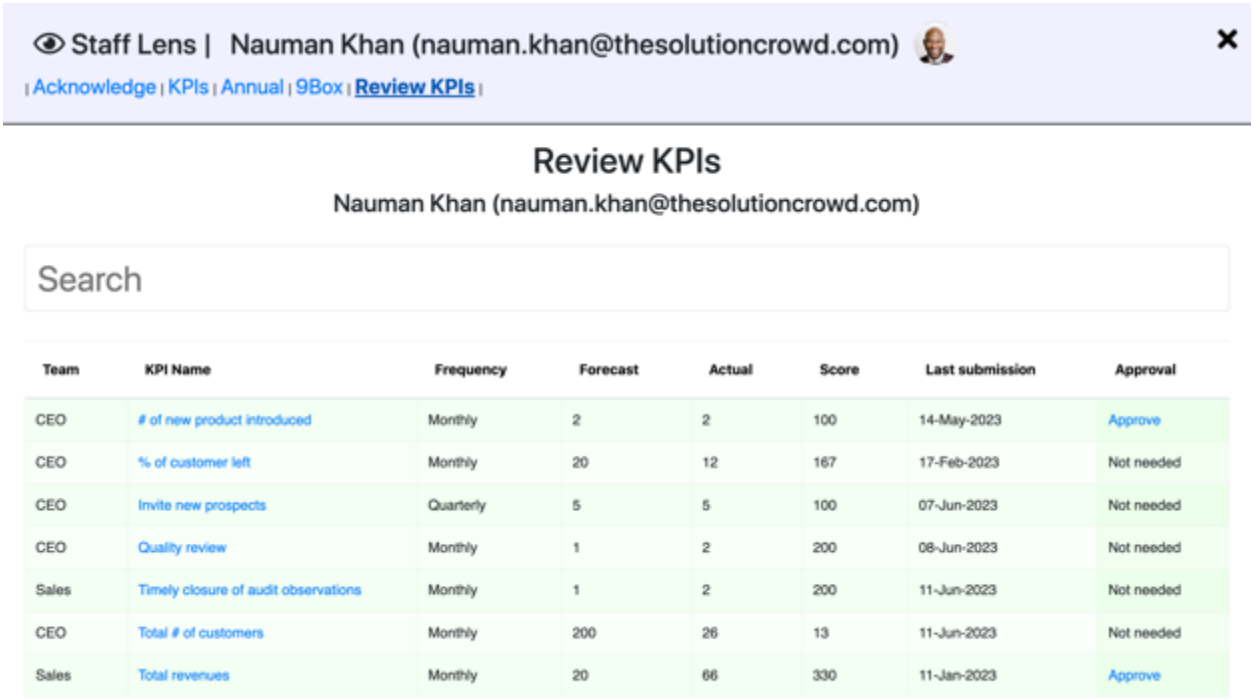

Team	KPI Name	Frequency	Forecast	Actual	Score	Last submission	Approval
CEO	# of new product introduced	Monthly	2	2	100	14-May-2023	Approve
CEO	% of customer left	Monthly	20	12	167	17-Feb-2023	Not needed
CEO	Invite new prospects	Quarterly	5	5	100	07-Jun-2023	Not needed
CEO	Quality review	Monthly	1	2	200	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

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See Quick Links video for full demo of all screens.

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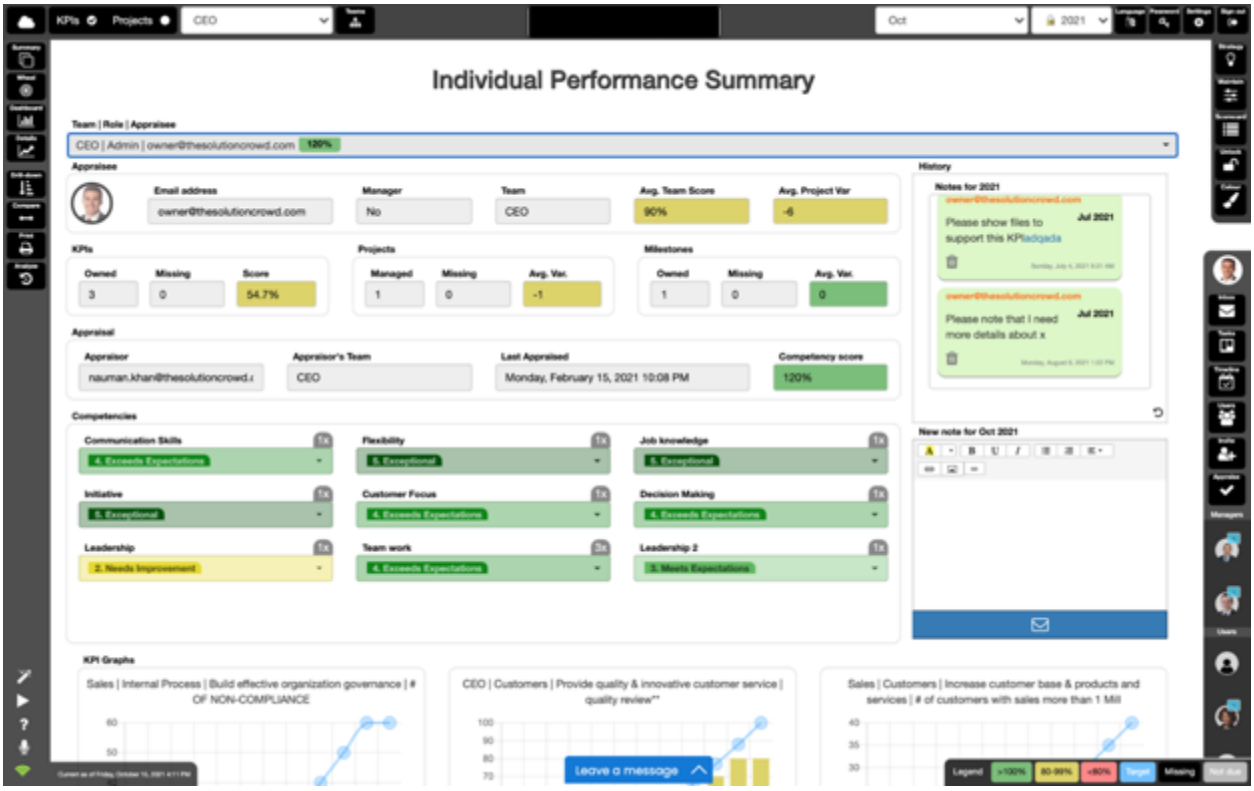
Staff performance

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.



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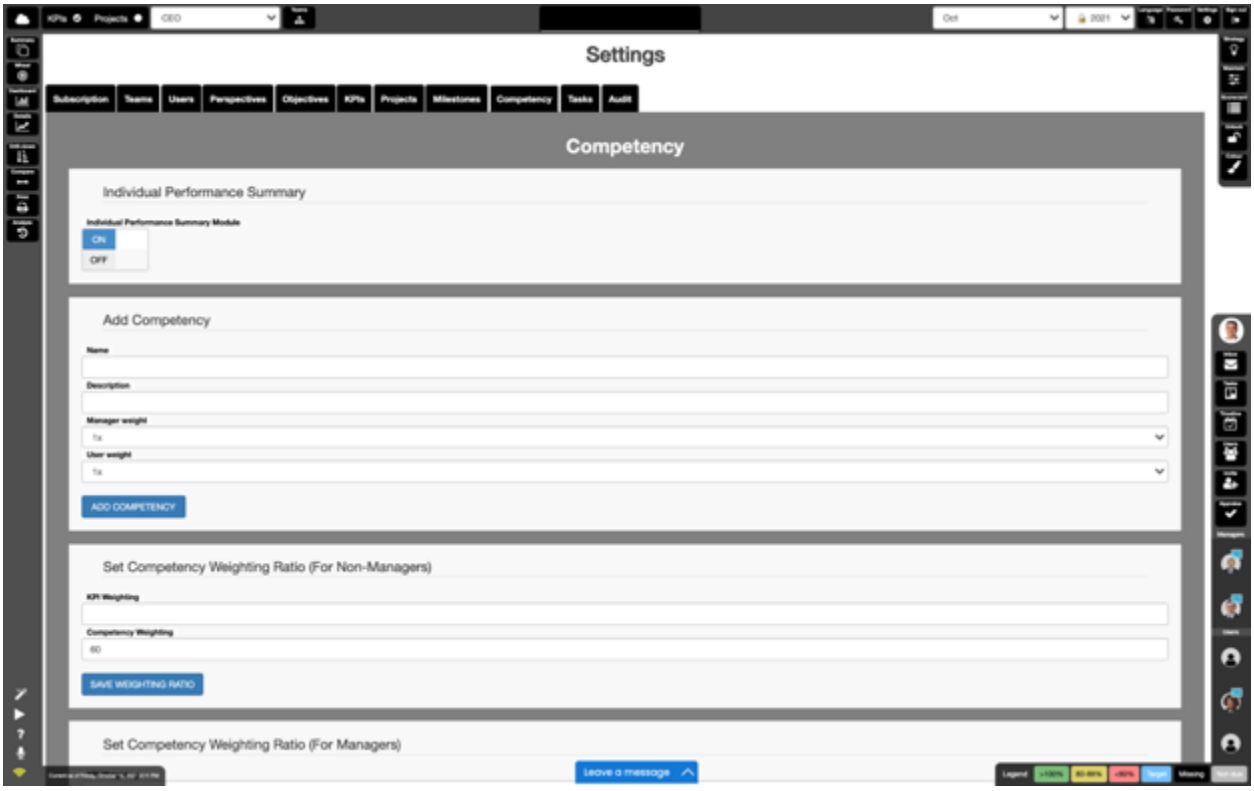
Staff appraisals

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.

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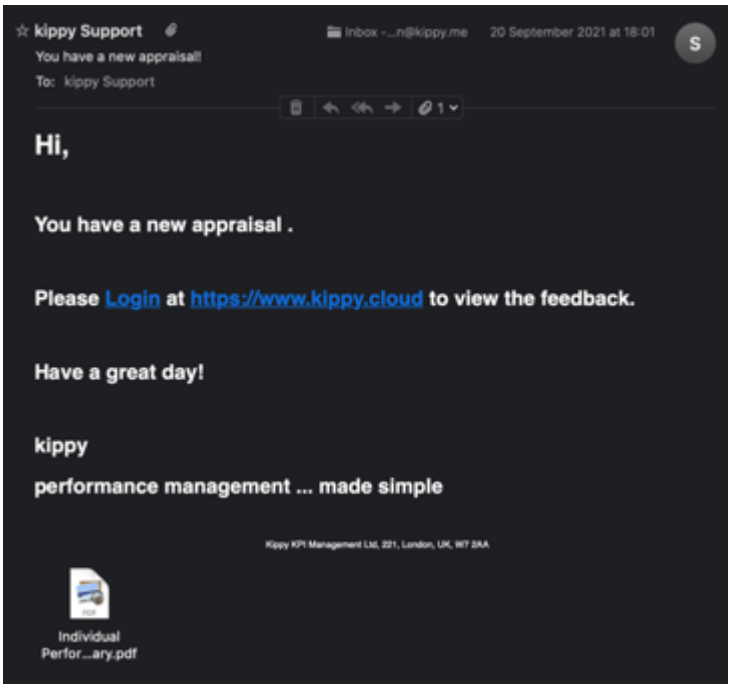

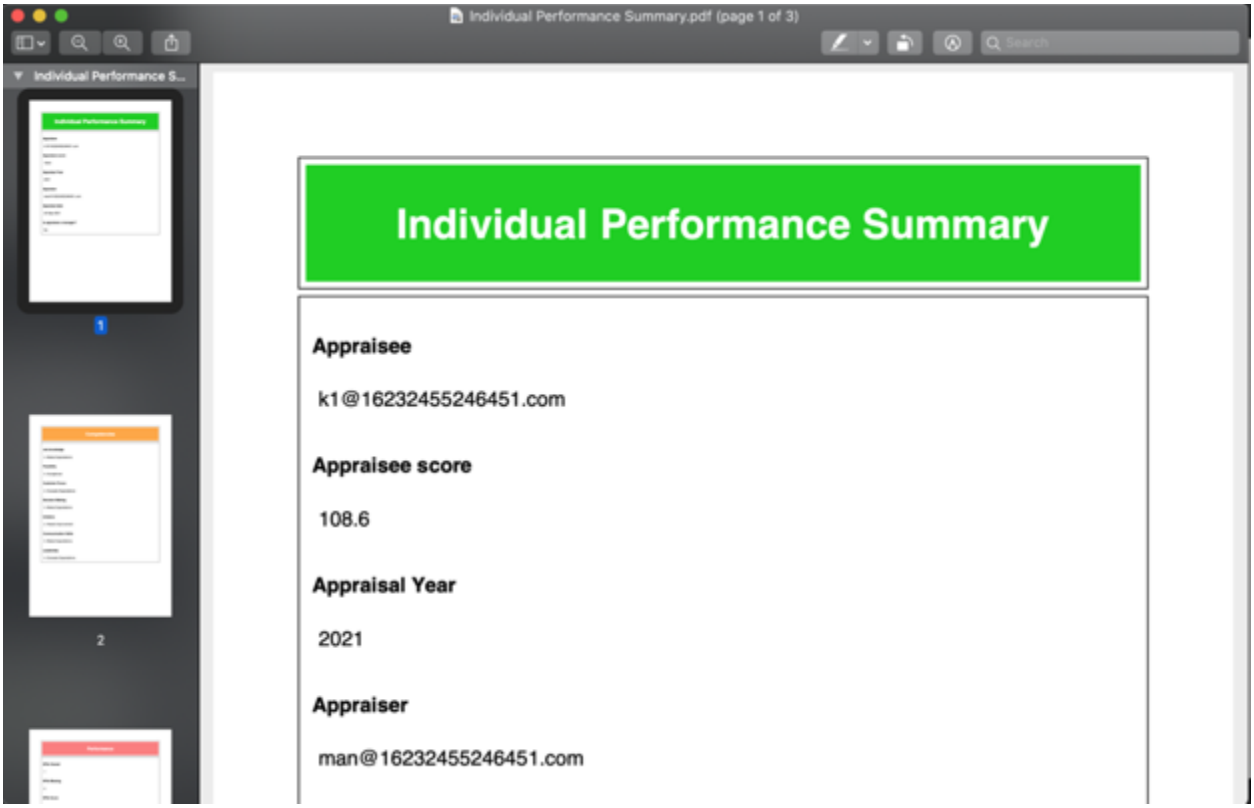

- The employee can then interact with the manager to discuss, create IDPs and if necessary escalate.

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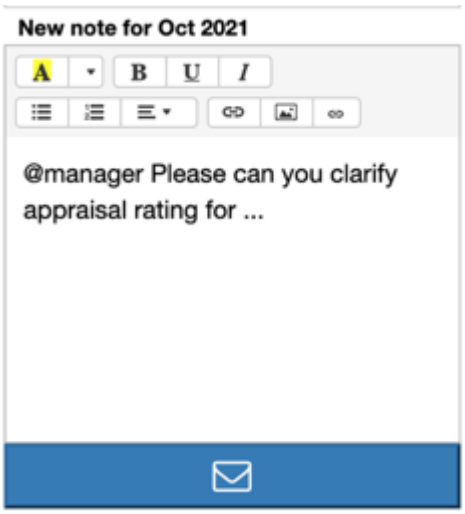
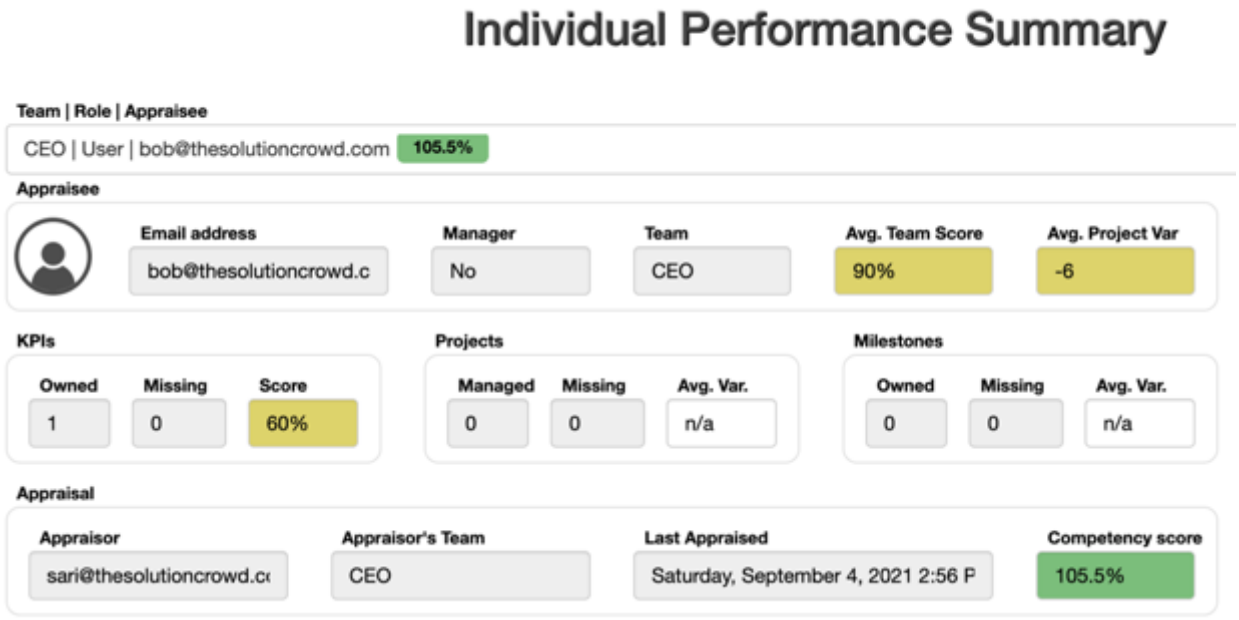


- The appraisal generates an average employee score and rating for the employee based on the weighted average of the performance score and the competency score.



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

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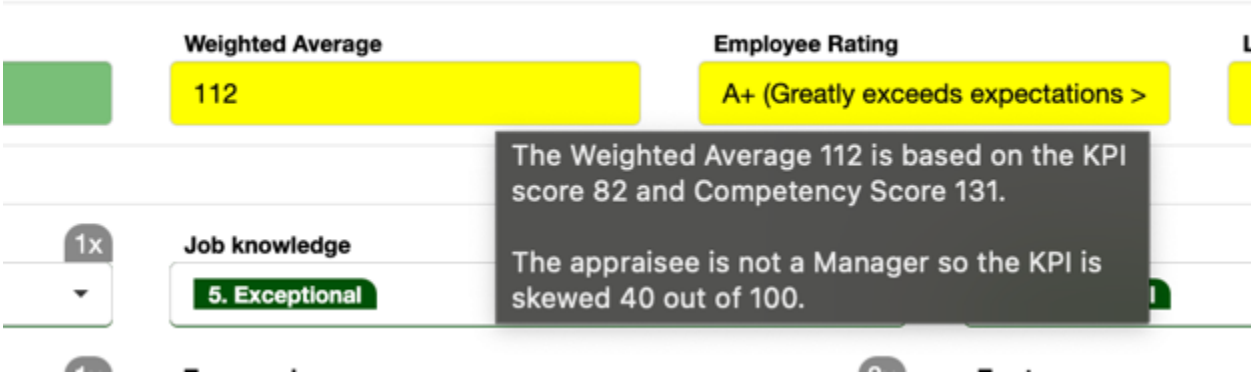

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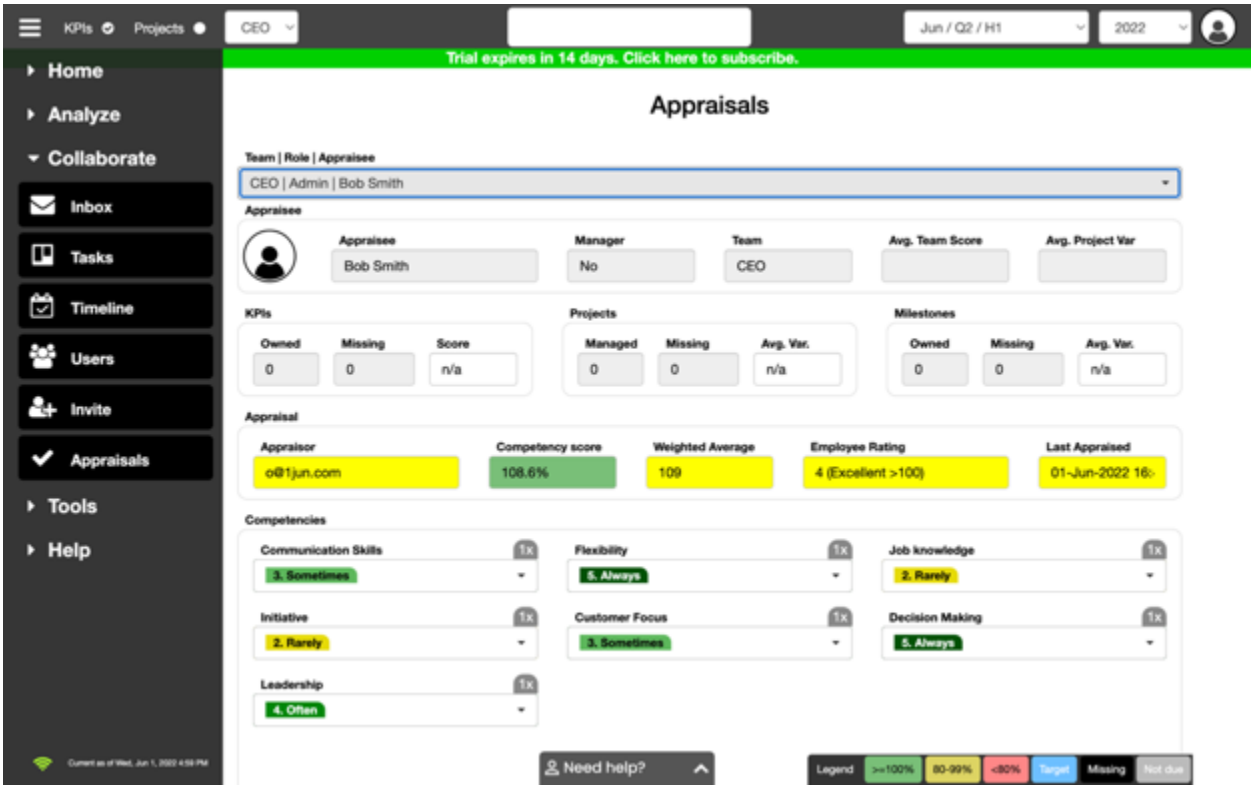
Self appraisals

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



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.

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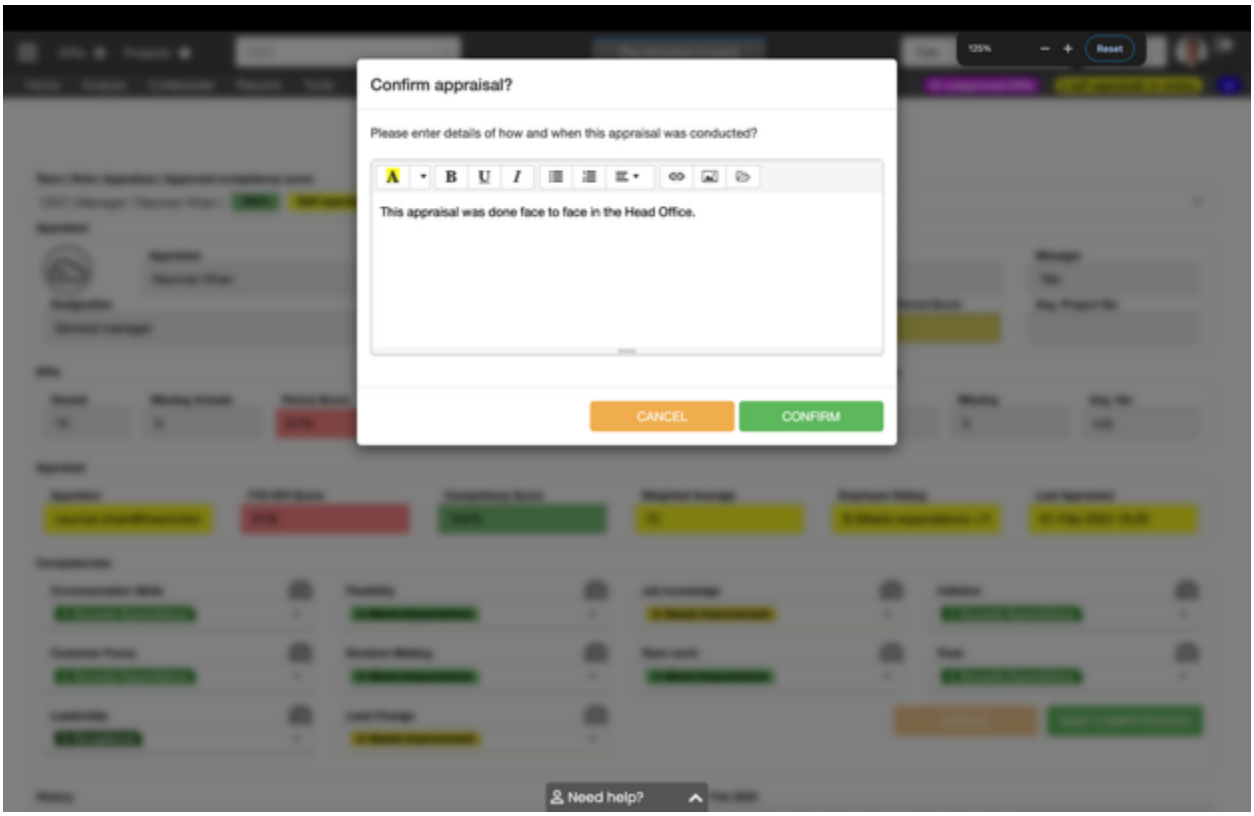

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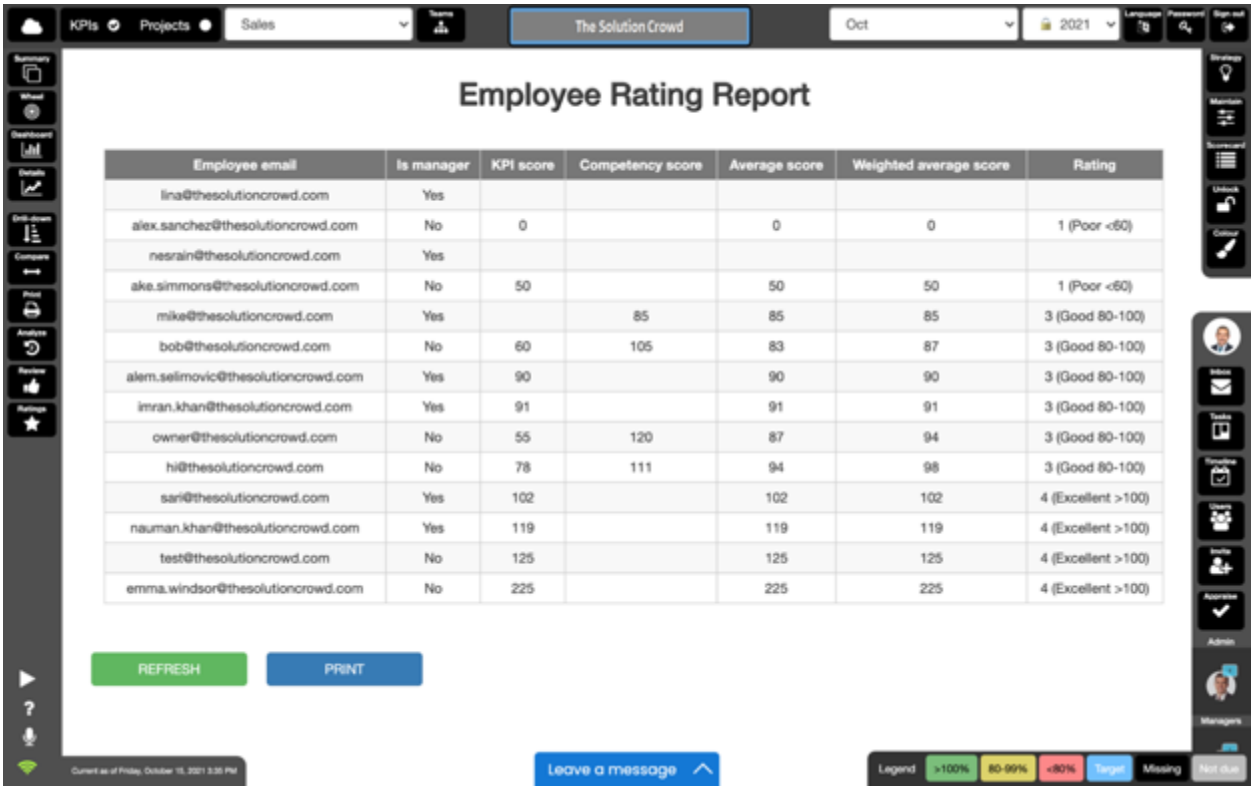
Employee Ratings

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)

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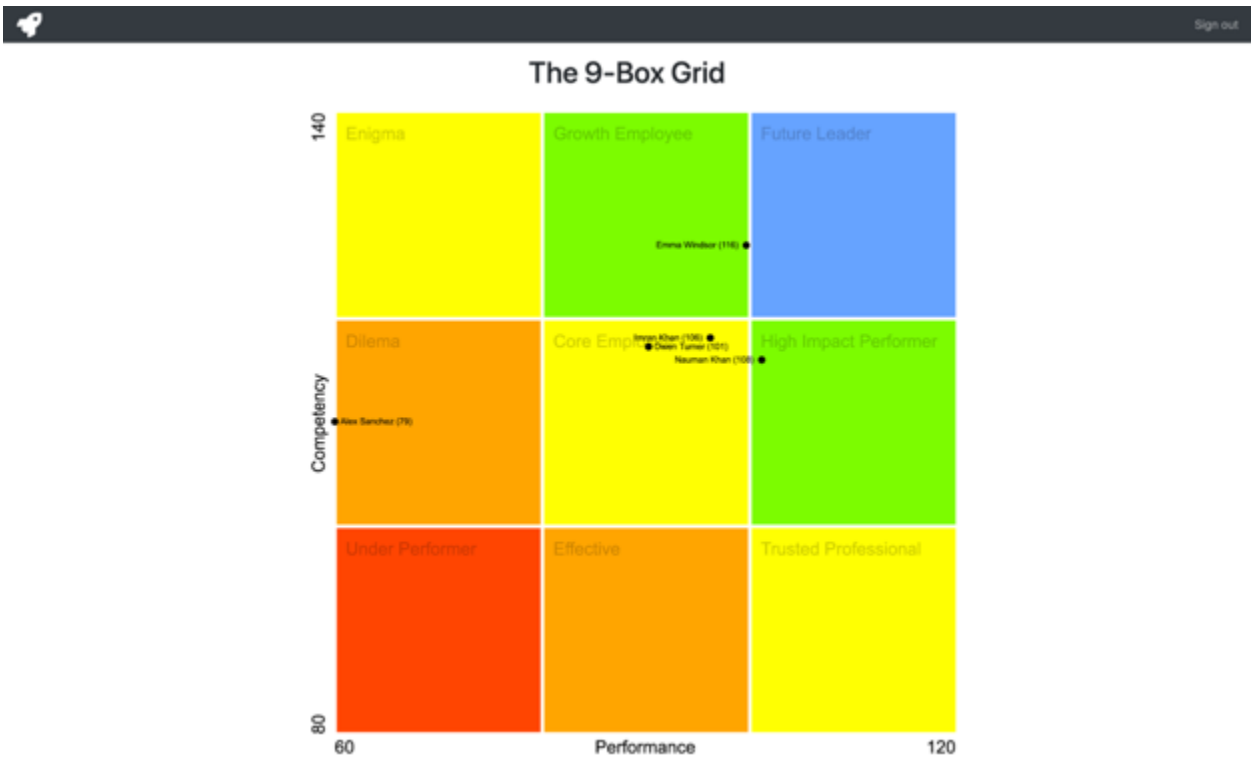
Employee email	Is manager	KPI Score	Comp Score	Avg	Weighted Avg	Rating
lina@thesolutioncrowd.com	Yes					
alex.sanchez@thesolutioncrowd.com	No	0		0	0	1 (Poor <60)
nesrain@thesolutioncrowd.com	Yes					
ake.simmons@thesolutioncrowd.com	No	50		50	50	1 (Poor <60)
mike@thesolutioncrowd.com	Yes		85	85	85	3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

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



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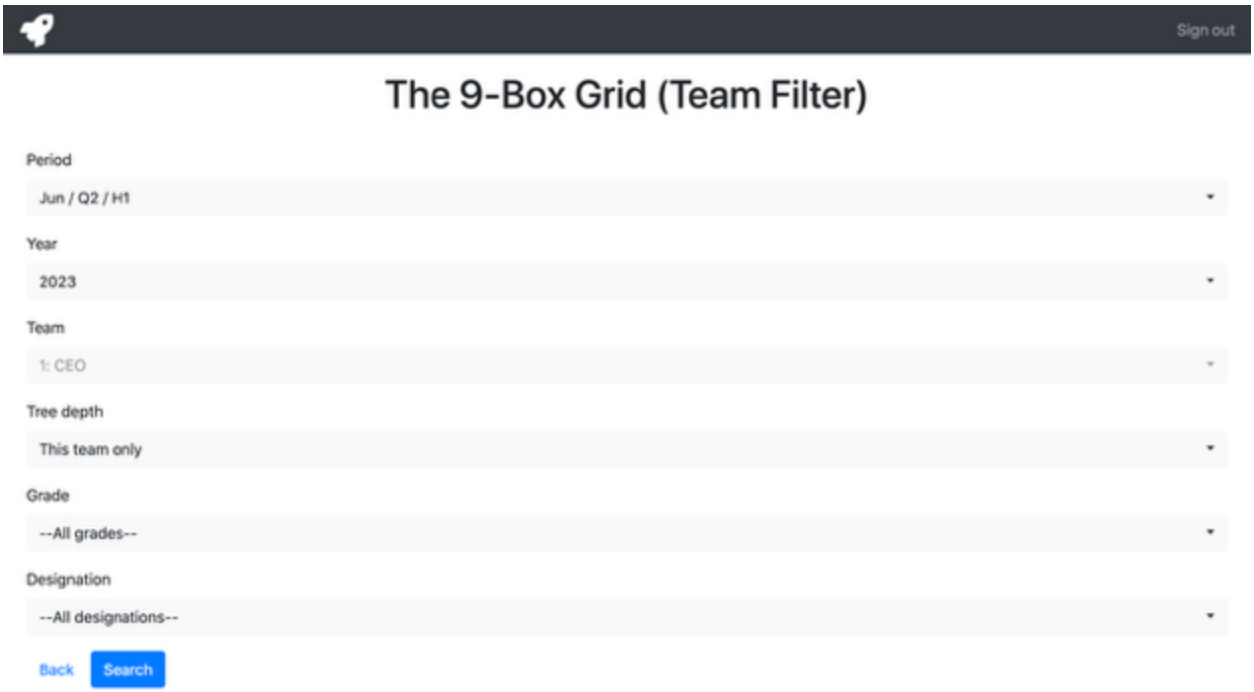

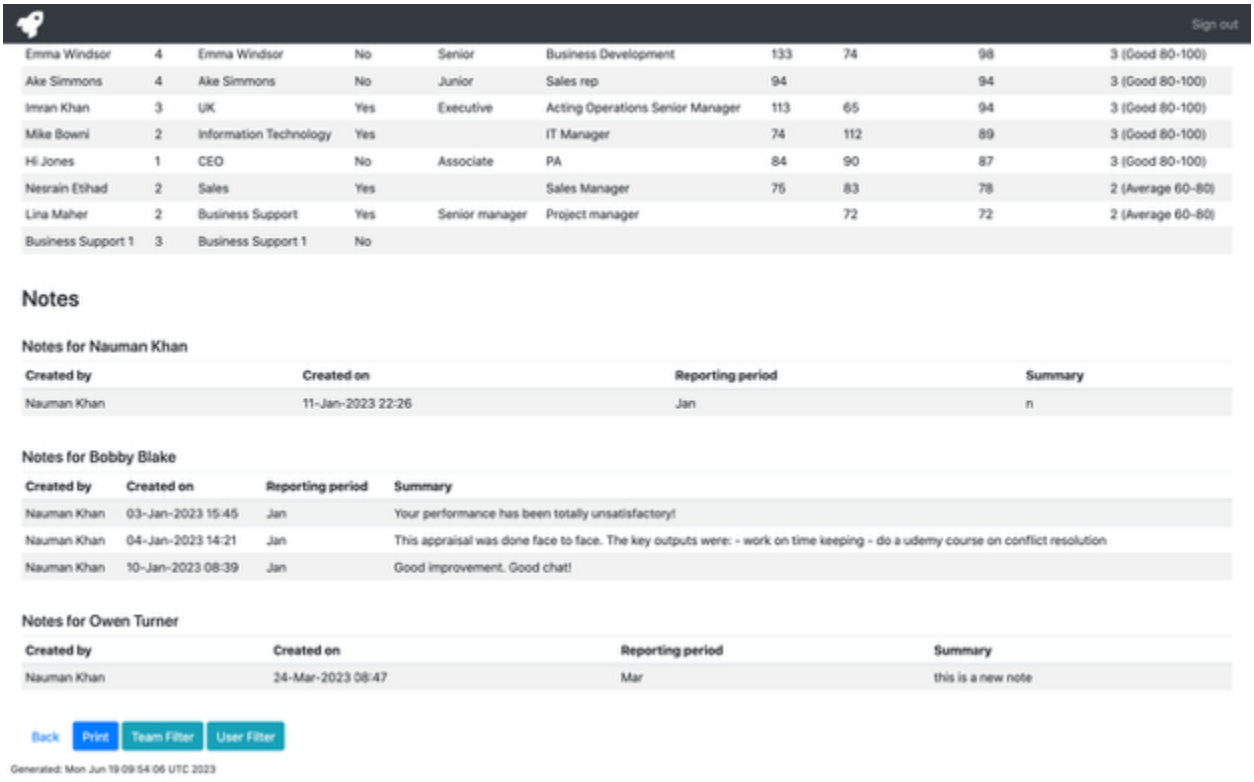

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Competencies

Employee	Communication Skills	Customer Focus	Decision Making	Flexibility	Initiative	Job knowledge	Lead Change	Leadership	Team work	Trust
Bobby Blake										
Hi Jones										
Owen Turner										
Joe Mardesrt										
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 Mardesrt	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	2							2	4
Sue		1	1	1	1	5	1		
Owen		3	5	1	4	4	2	5	
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.

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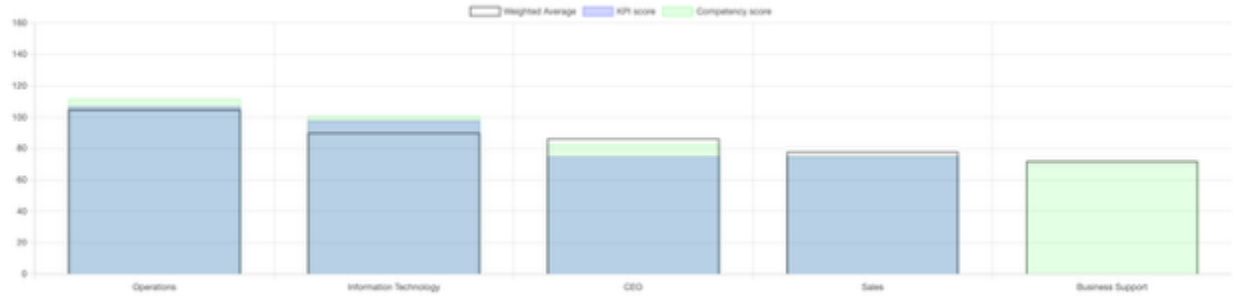
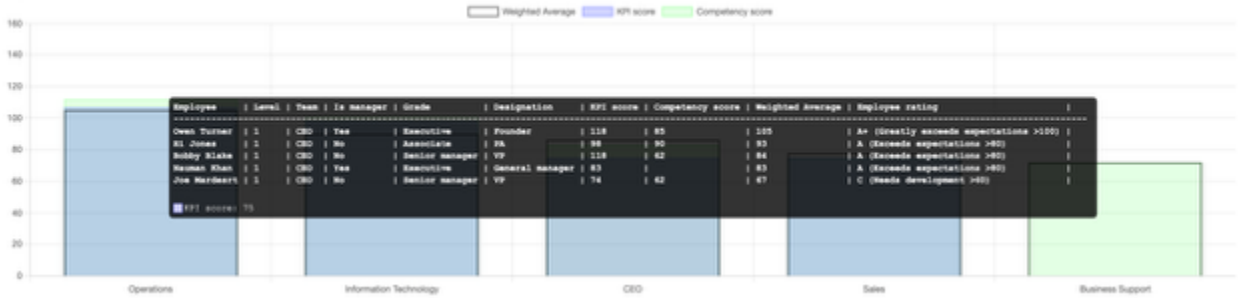
By employee

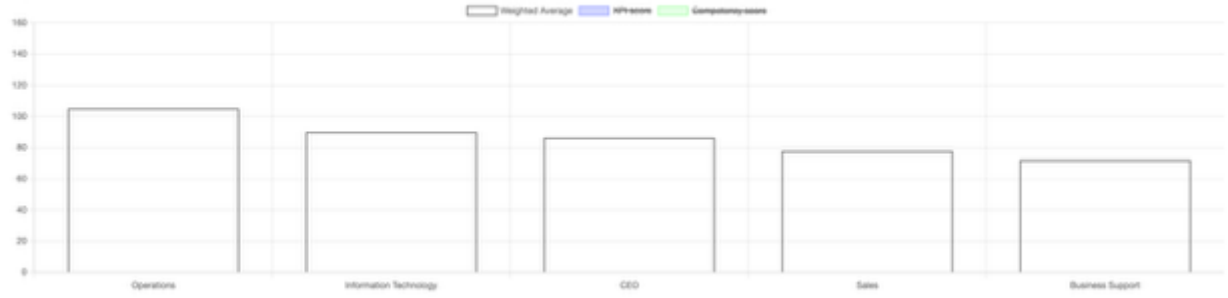
By team



By team



By team



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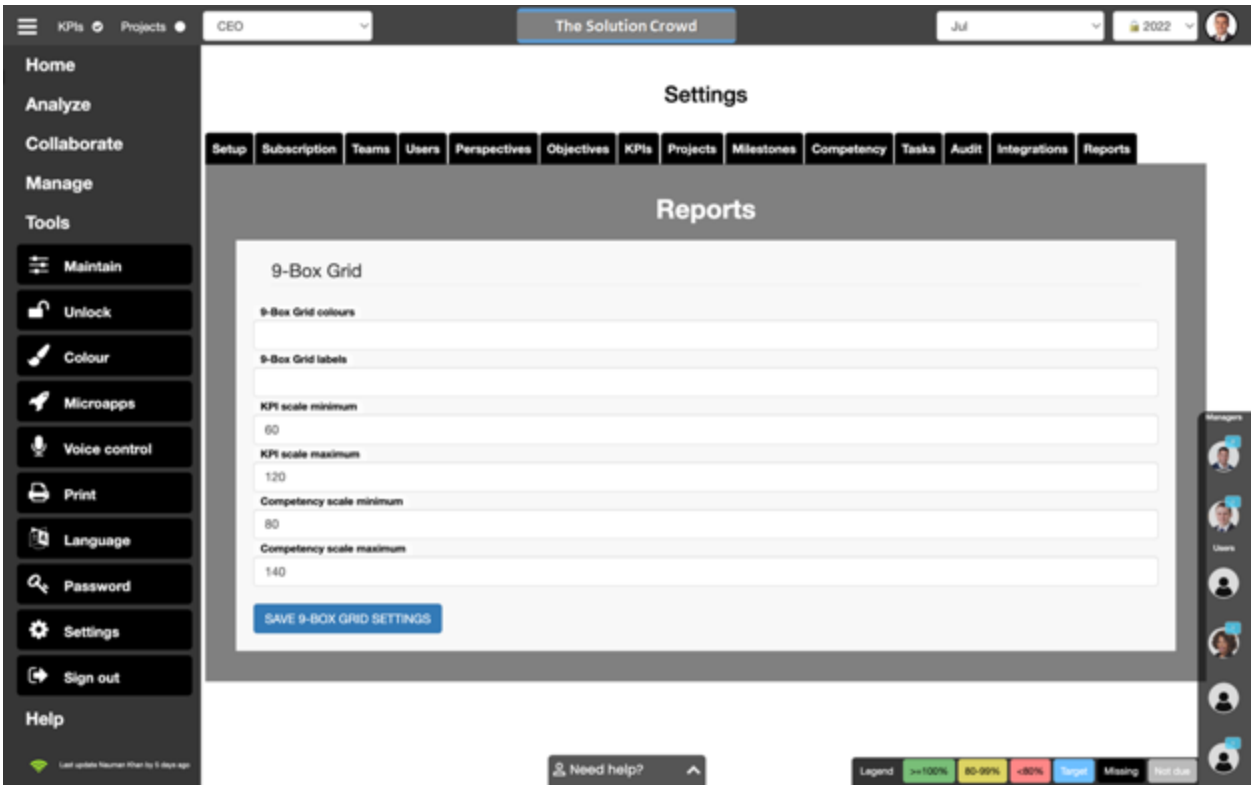

The individual view of the 9-box shows changes over the year and includes a summary of manager feedback.

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.

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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 Etihad	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

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.

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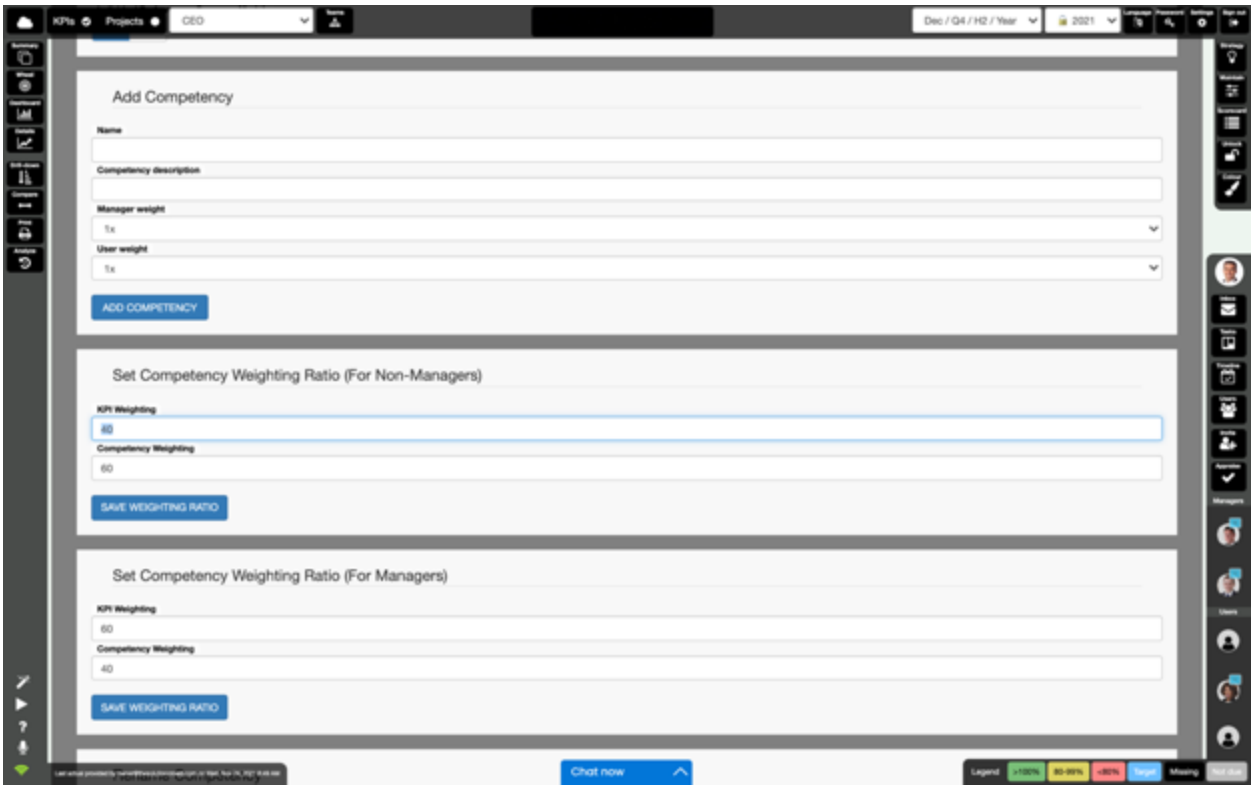
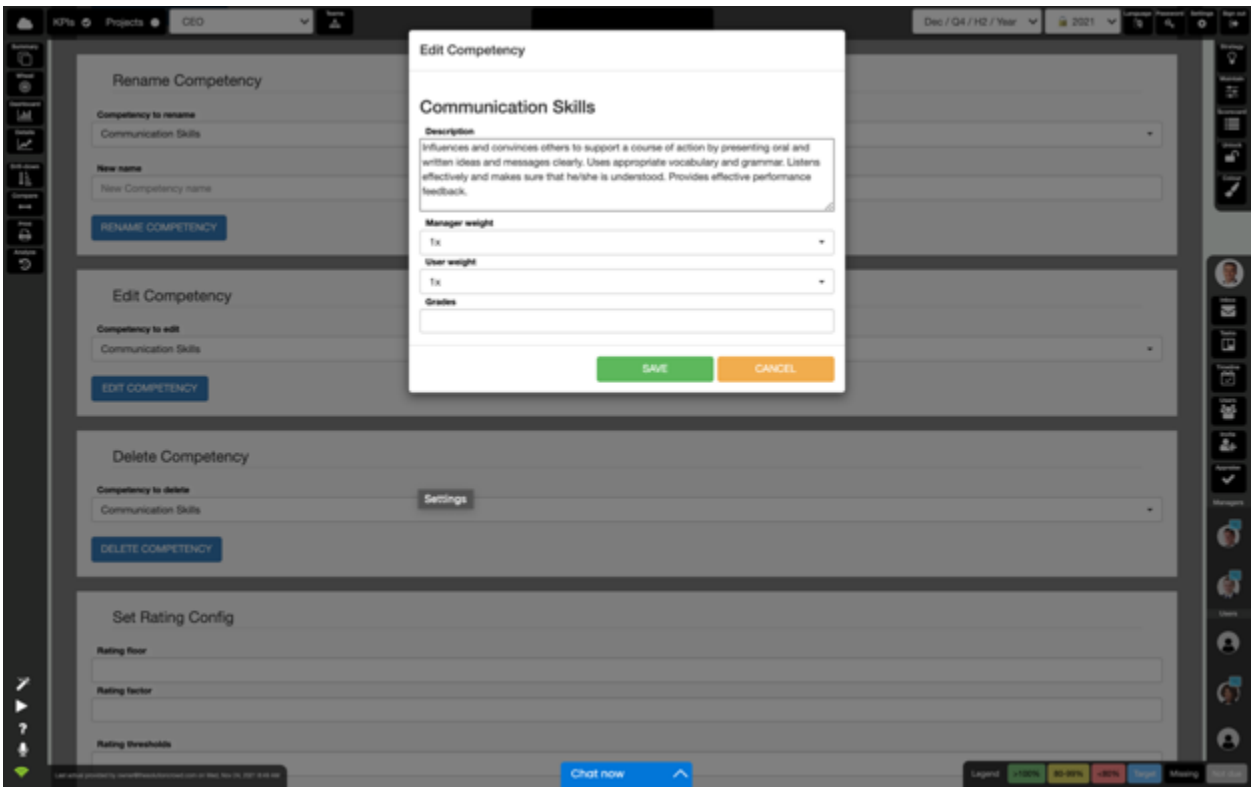


Add maintain your own set of competencies. Set different competencies for different ‘grades’ of user.



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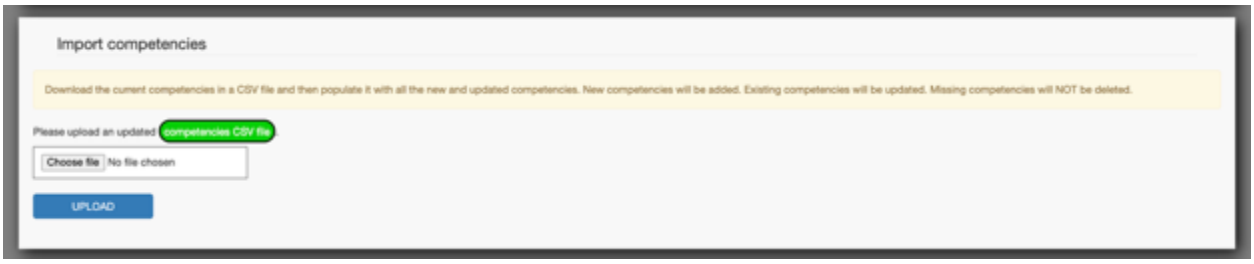
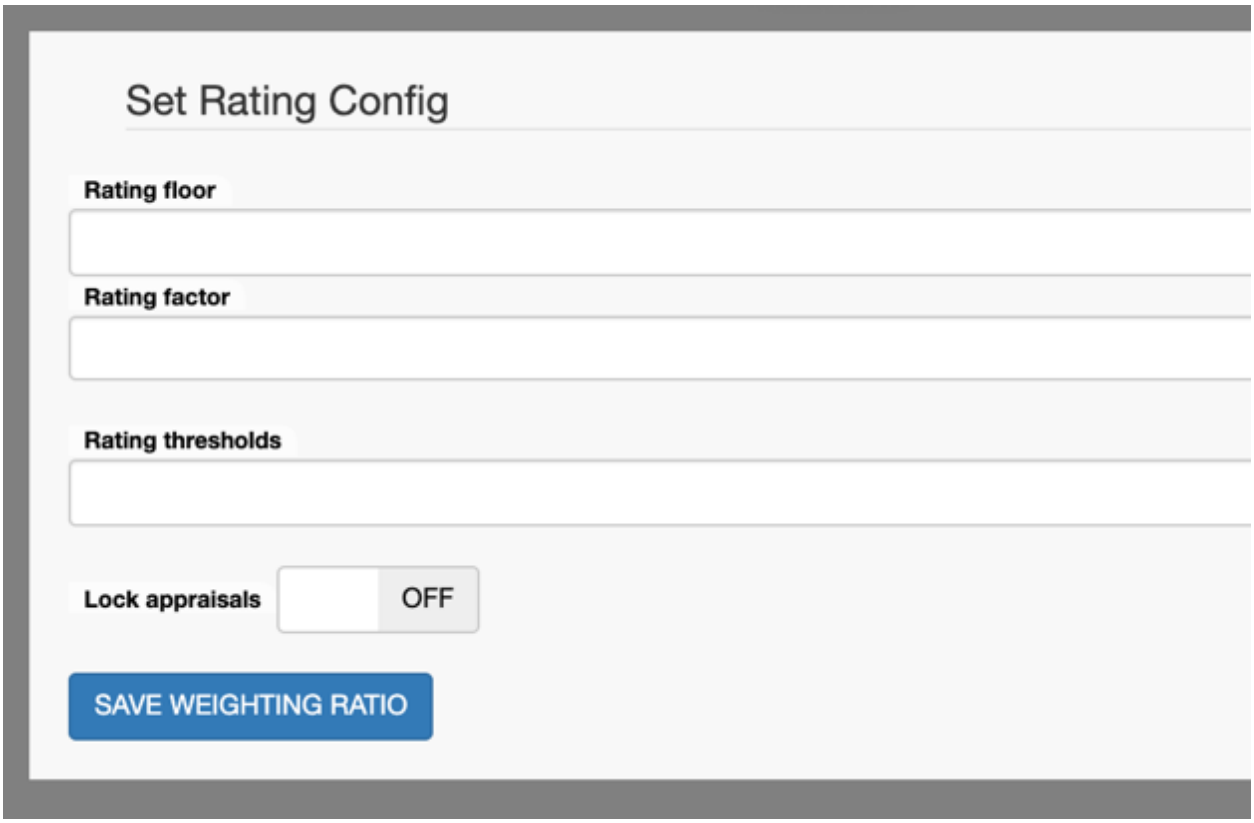
Competencies can also be added in bulk.



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



Acknowledgements and 360-degree Feedback

Users can leave acknowledgements for other users.

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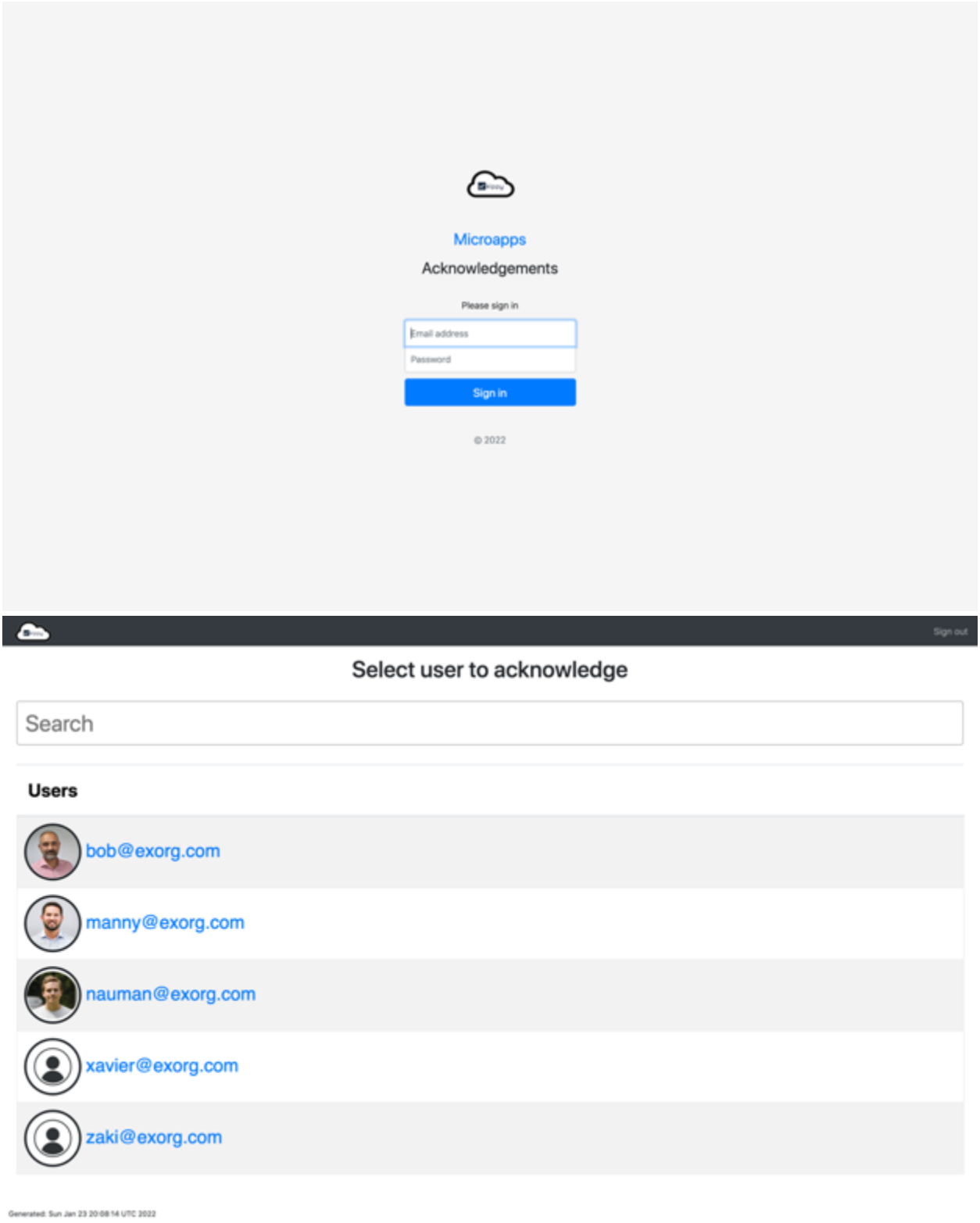

The acknowledgement and 360-degree feedback can also be left anonymously.

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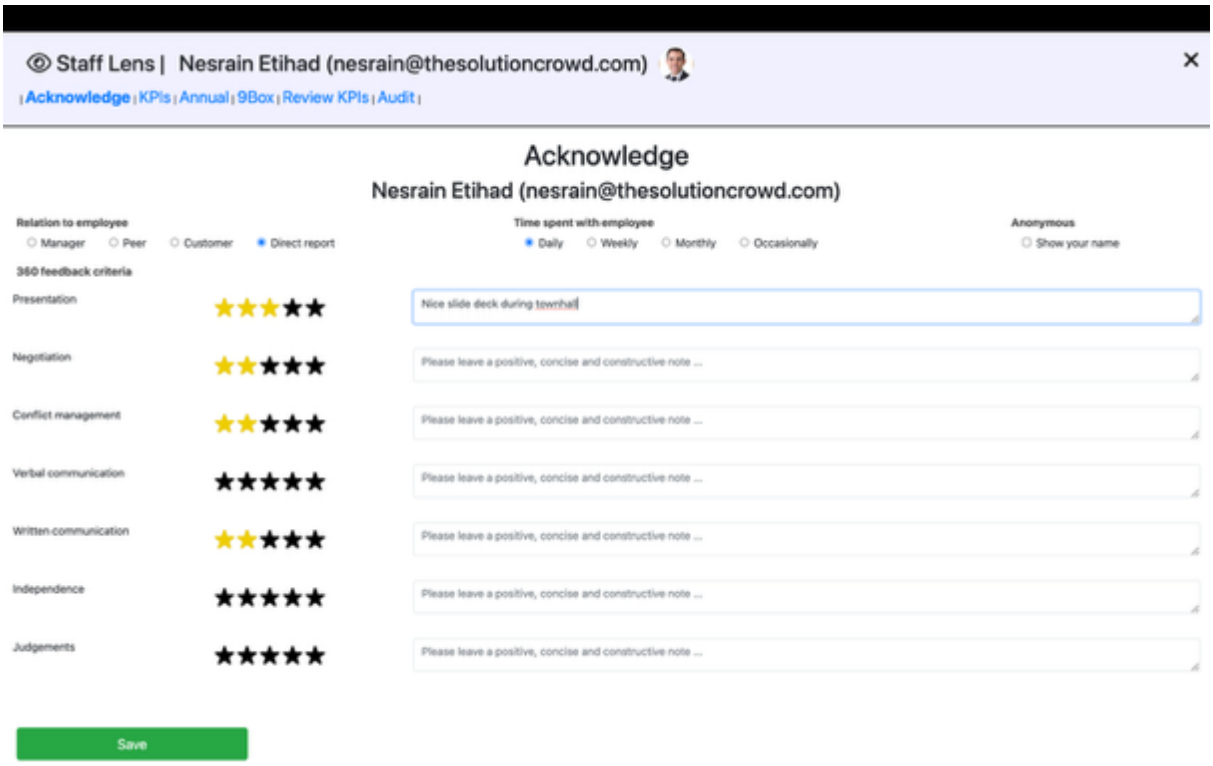
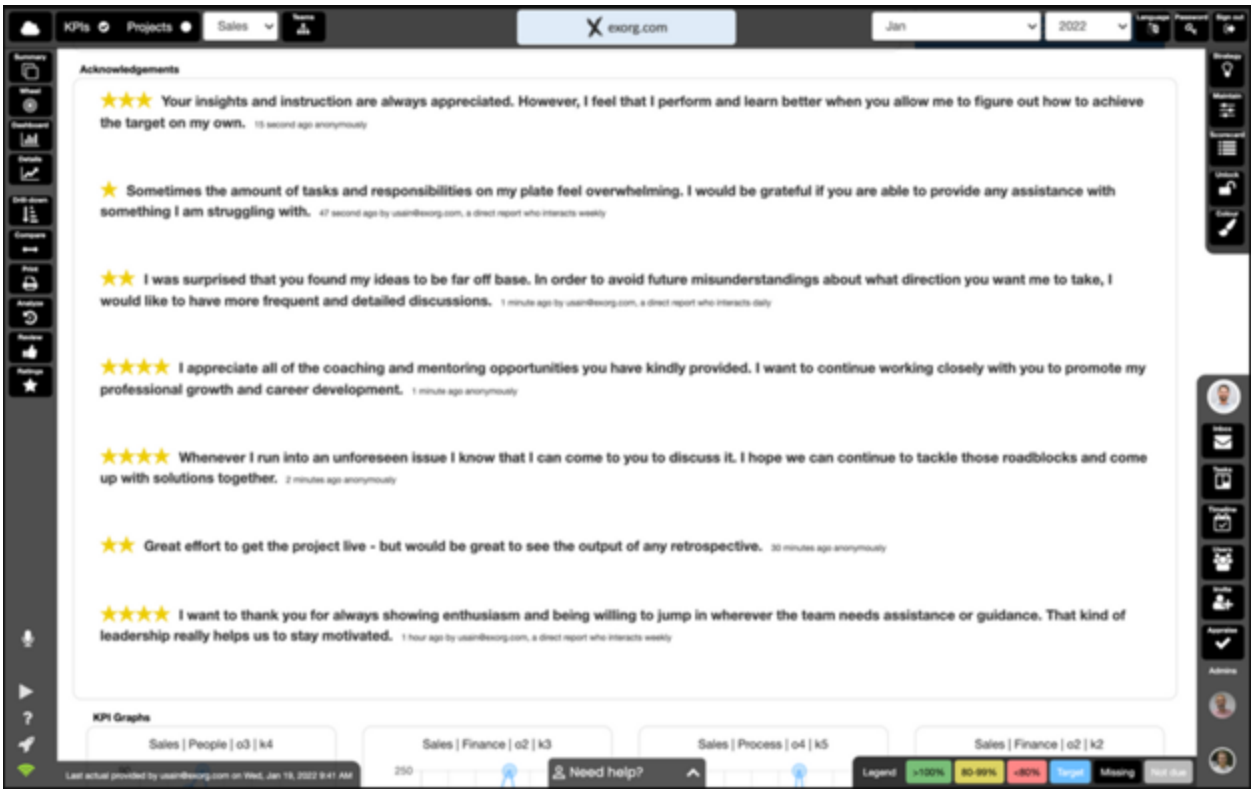


The acknowledgement and 360-degree feedback are then available to the recipients and their managers – on the Individual Performance Summary screen.



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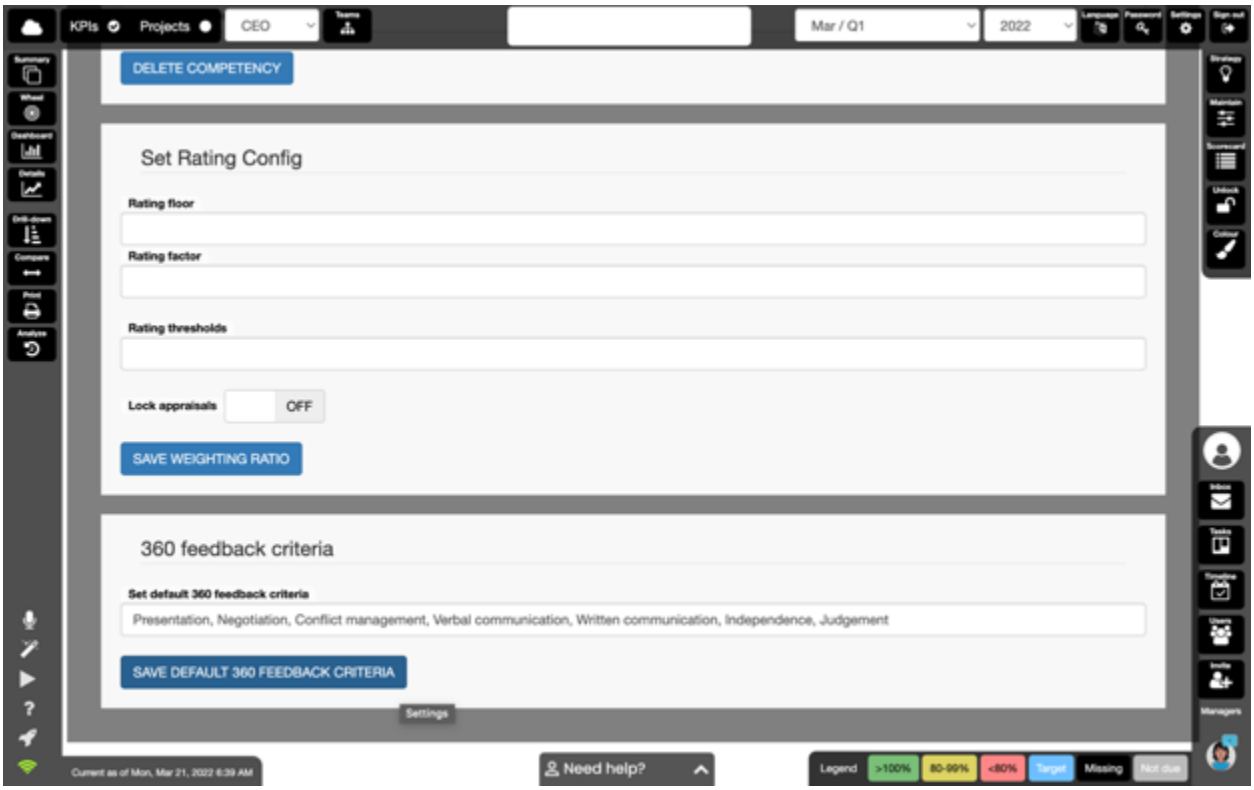
The feedback can also be left via the main kippy app clicking on a user's avatar.

The feedback criteria are configurable in the setting screen.



The feedback is summarized in interactive radar graphs per employee.

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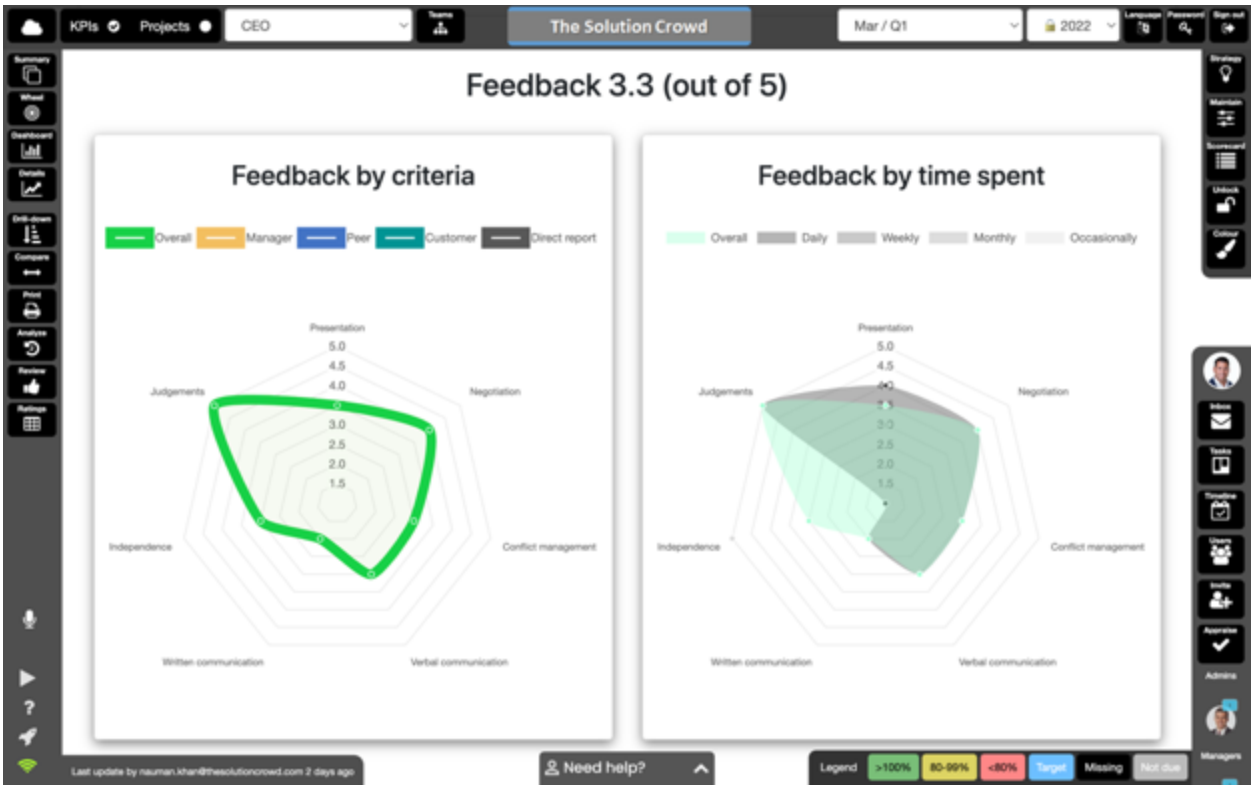
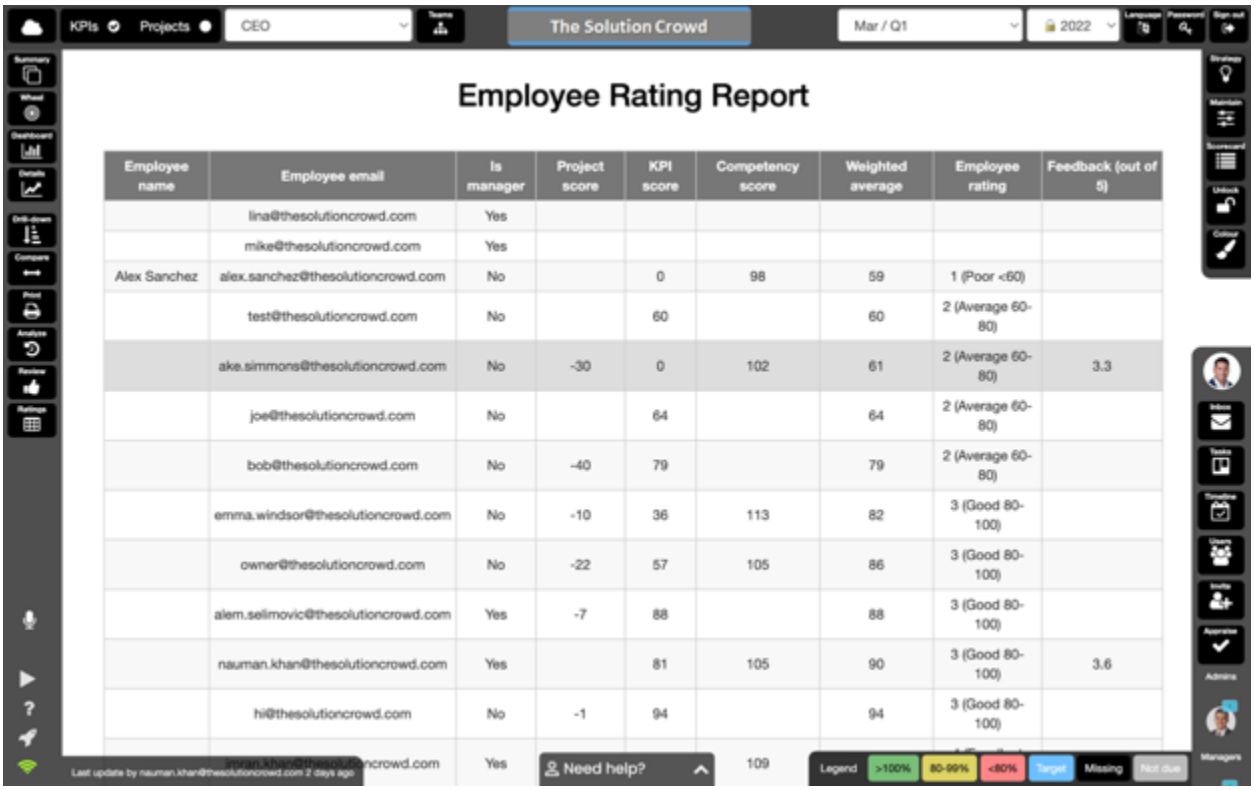


The average feedback score is also presented on the Employee Rating Report.



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

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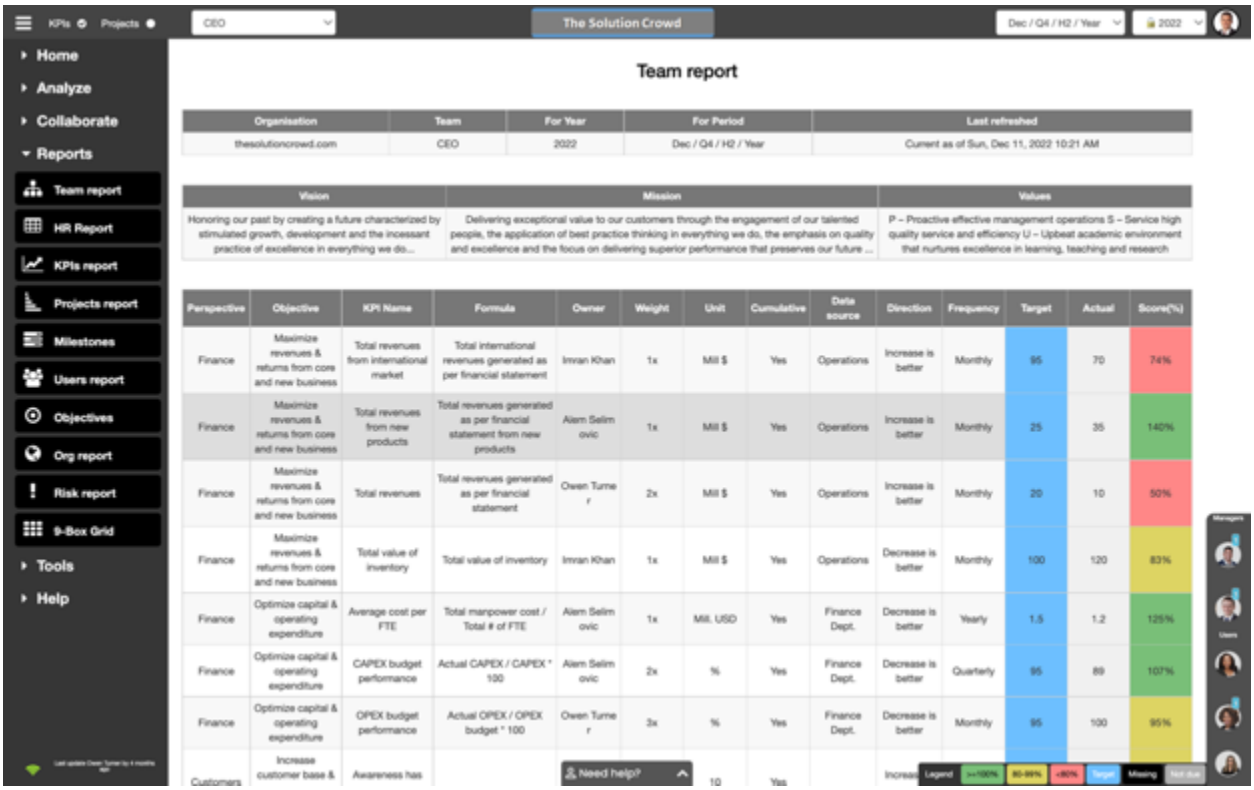
Reports

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



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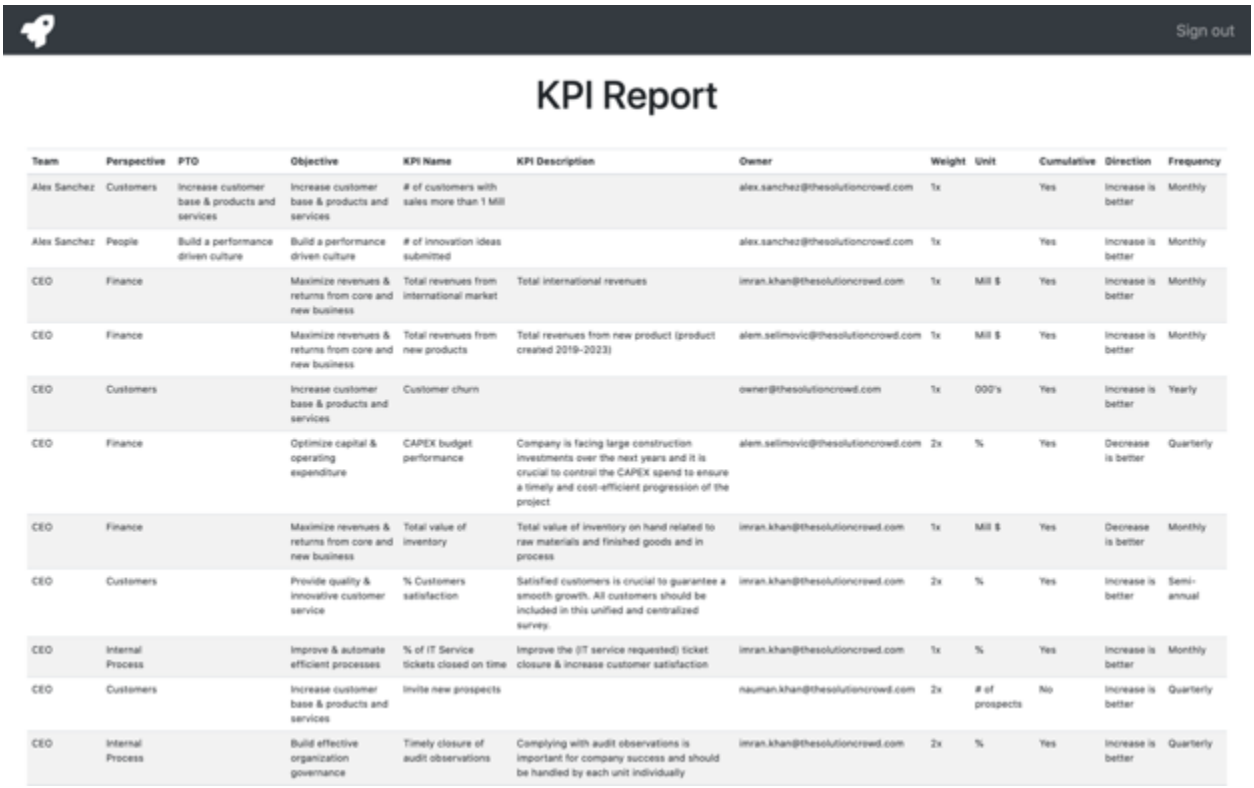
KPIs Report



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

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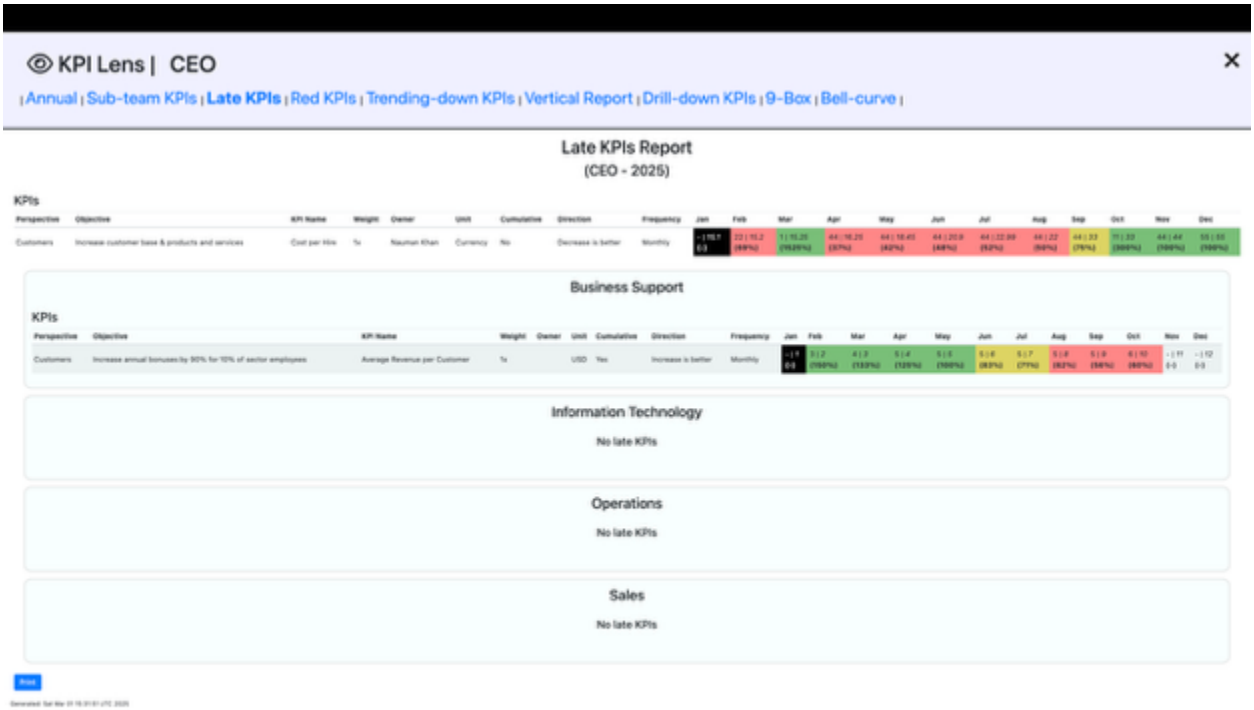
Sign out

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 Mil			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

Business Support

KPIs

Information Technology

No late KPIs

Operations

No late KPIs

Sales

No late KPIs

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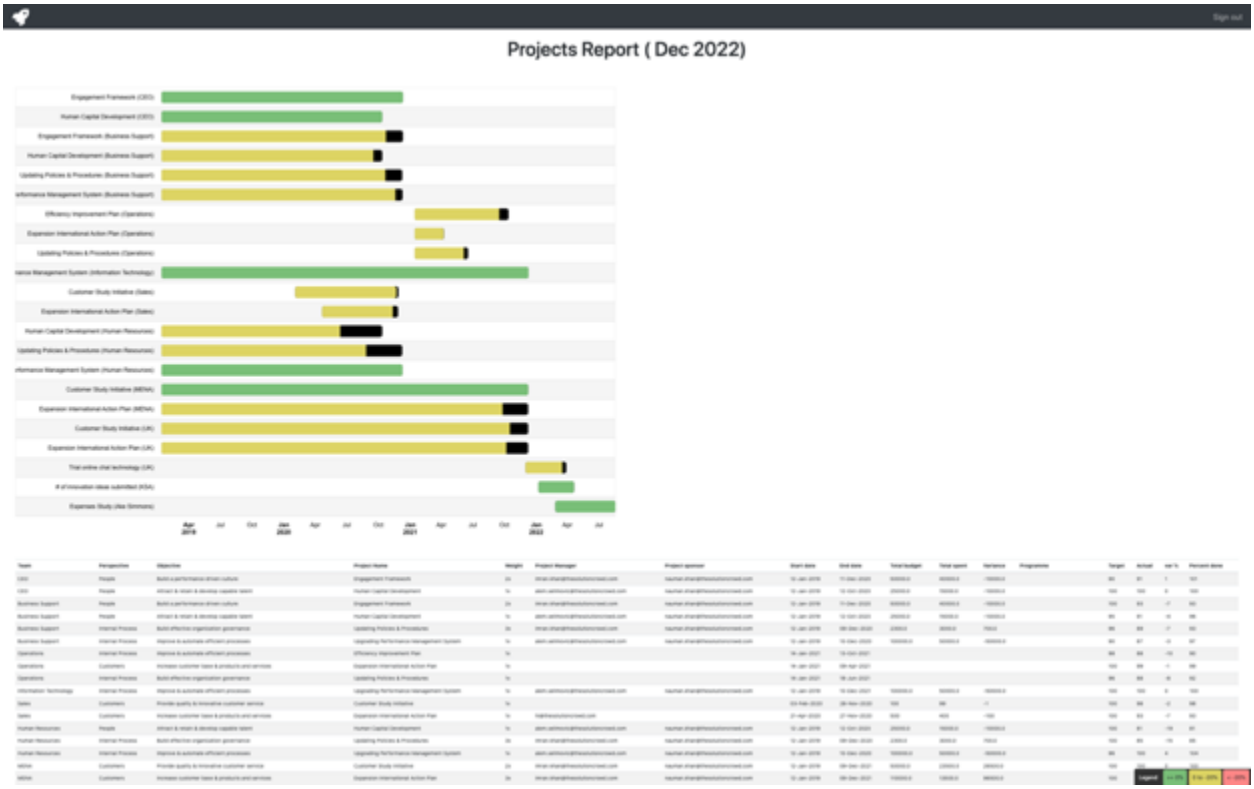
Projects report



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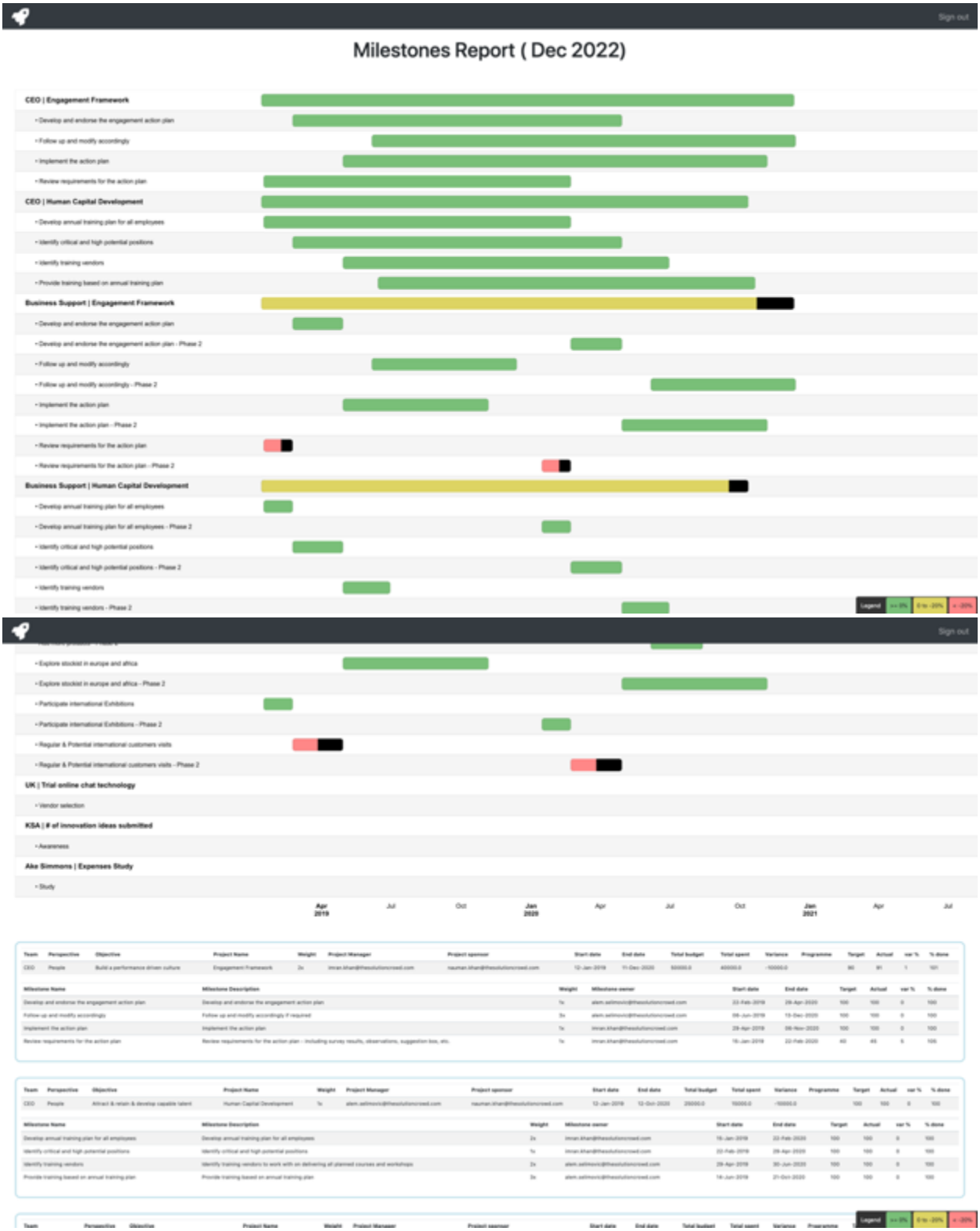
Milestones Report



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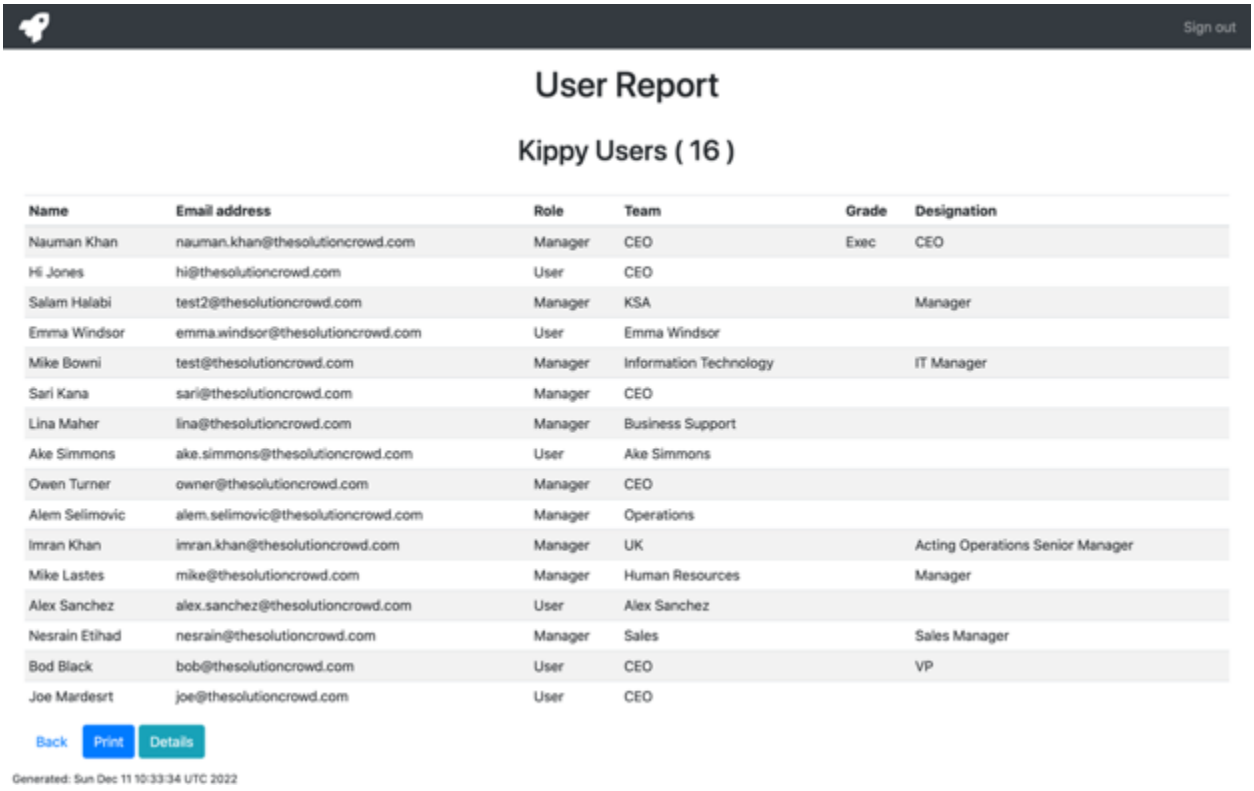
Users reports



Sign out

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		

Back Print Details

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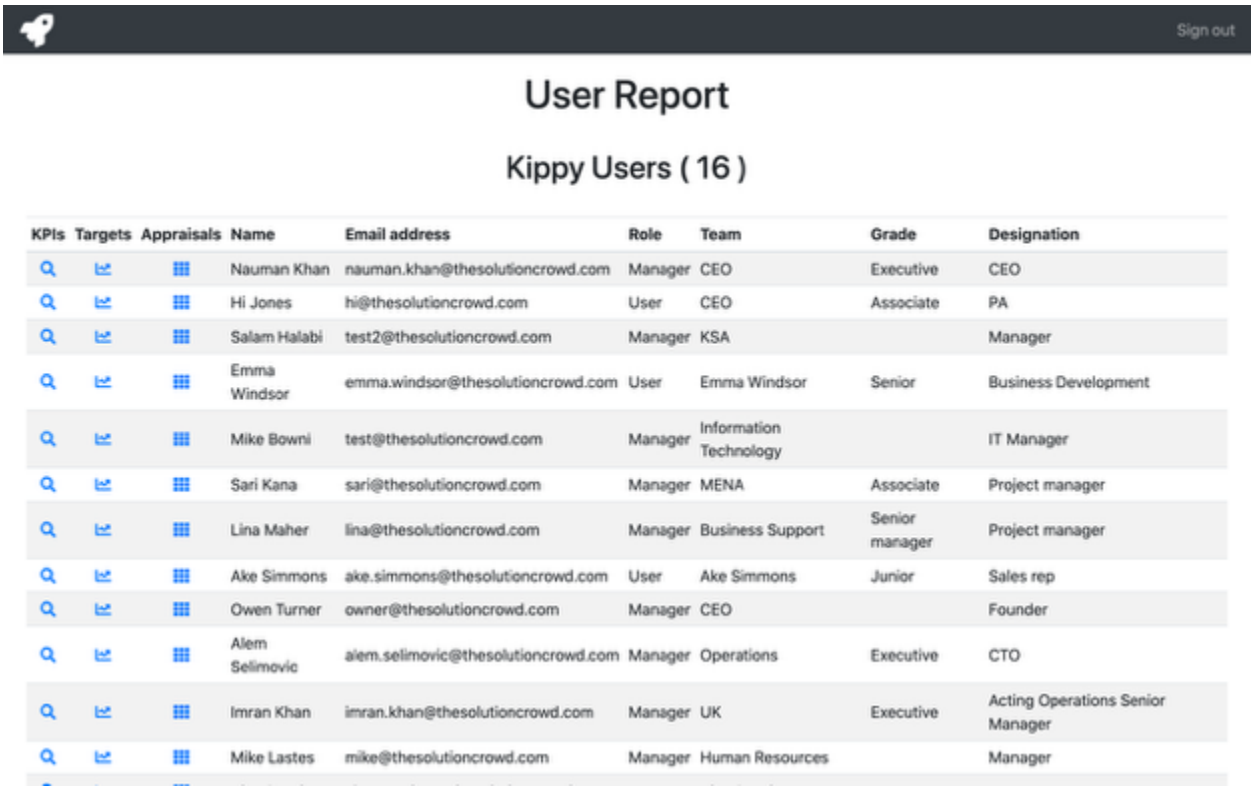

Sign out

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

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Month	Weighted Average	Employee rating	KPI score	Competency score	Appraised on	Appraised by
Jan	90	3 (Good 80-100)	100	82	24-Feb-2023	nauman.khan@thesolutioncrowd.com
Feb	81	3 (Good 80-100)	87	76	24-Feb-2023	nauman.khan@thesolutioncrowd.com

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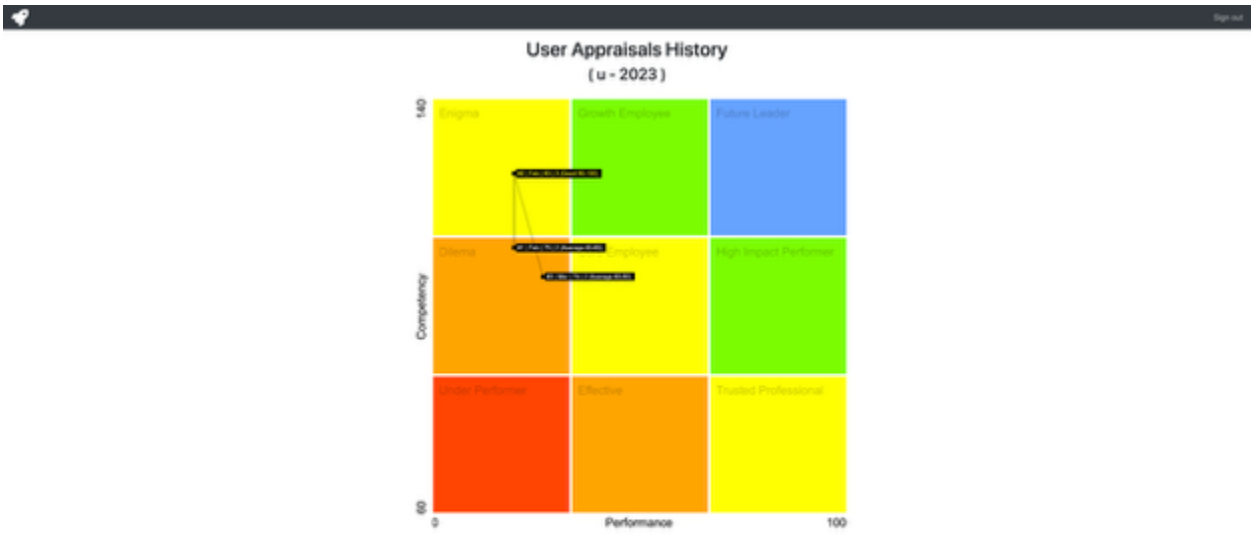

#	Month	Weighted Average	Employee rating	KPI score	Competency score	Appraised on	Appraised by
1	Feb	75	2 (Average 60-80)	20	111	24-Feb-2023	m@test.24feb.com
2	Feb	83	3 (Good 80-100)	20	125	24-Feb-2023	u@test.24feb.com
3	Mar	76	2 (Average 60-80)	27	105	24-Feb-2023	m@test.24feb.com

Back Print

Generated: Fri Feb 24 13:51:46 UTC 2023

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Objectives

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

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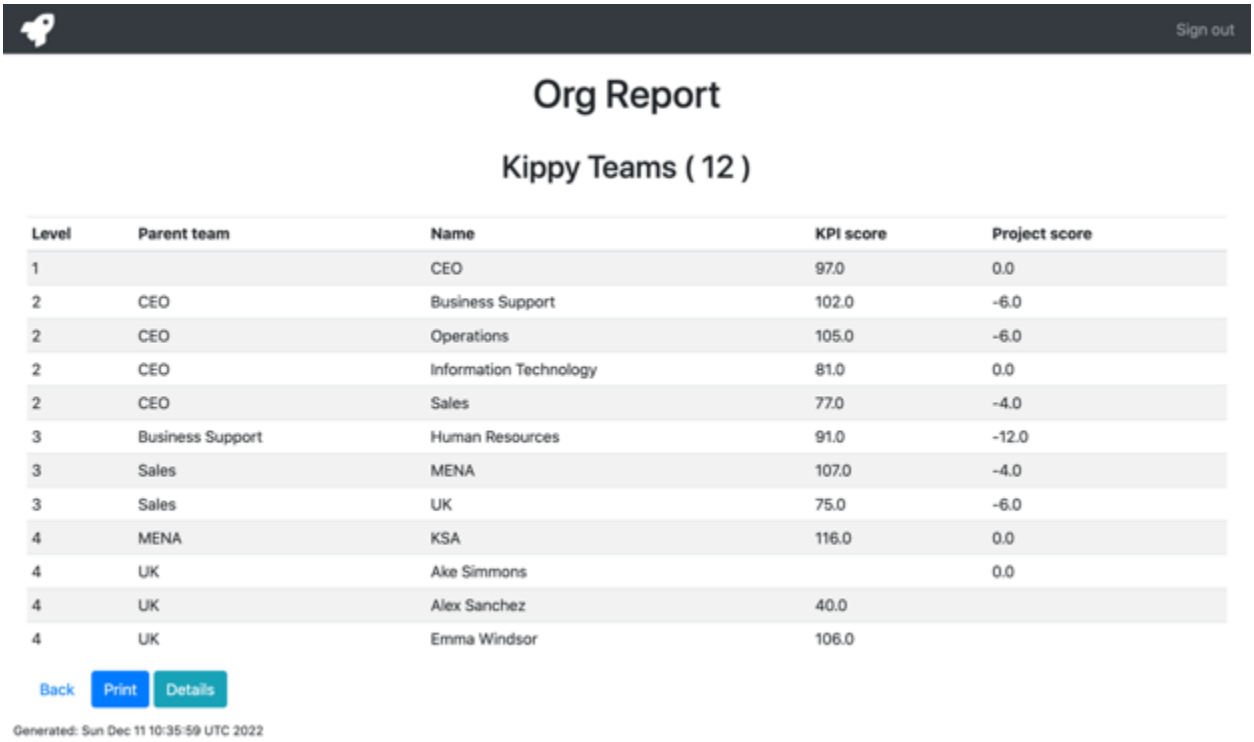
Org reports



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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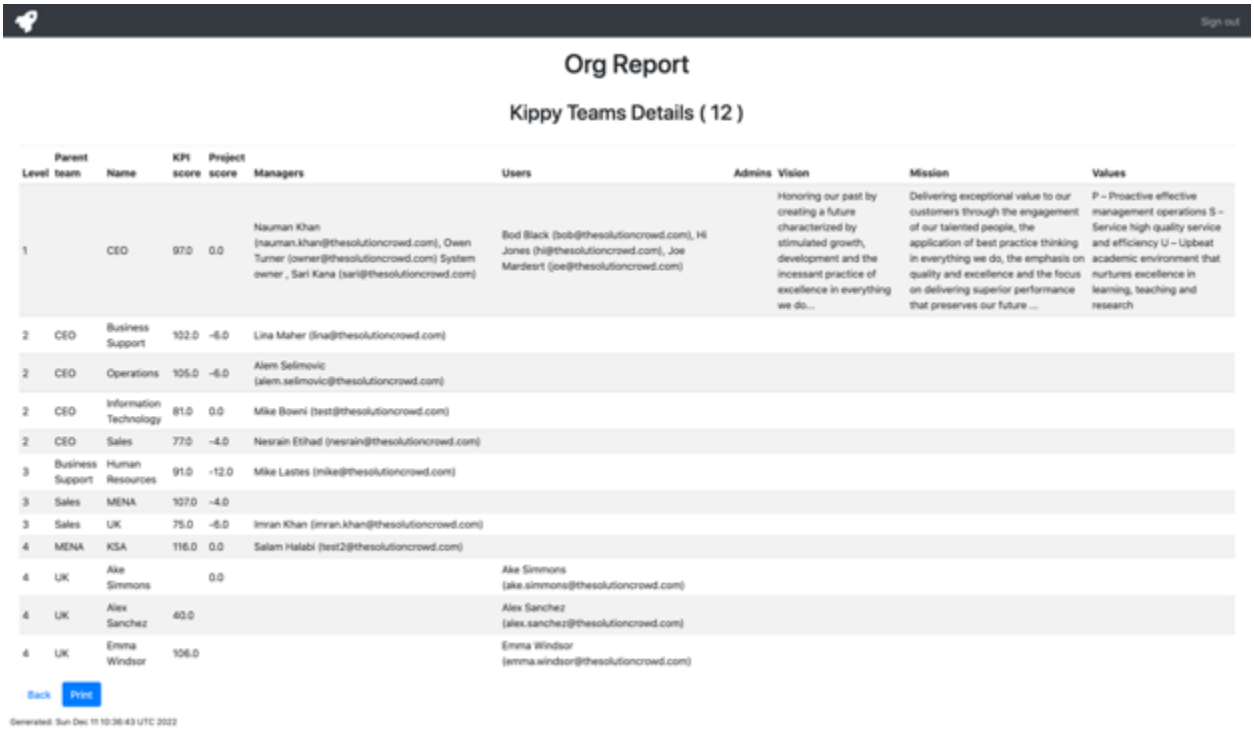

Sign out

Org Report

Kippy Teams Details (12)

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

Back Print

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Annual reports

See annual view per user/team KPIs and projects.

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 | 1 (500%)	5 | 1 (500%)	5 | 1 (500%)	5 | 1 (500%)	5 | 2 (250%)	5 | 2 (250%)	5 | 2 (250%)	5 | 2 (250%)	6 | 5 (120%)	6 | 5 (120%)	6 | 5 (120%)	15 | 9 (167%)
Internal Process	Improve & automate efficient processes	# of key business processes improved and or automated	1x	Imran Khan	Bus. Process	Yes	Increase is better	Monthly	- | 1 (-)	- | 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 | 1 (300%)	1 | 1 (100%)	1 | 1 (100%)	2 | 1 (200%)	2 | 2 (100%)	2 | 2 (100%)	2 | 2 (100%)	2 | 2 (100%)	2 | 3 (67%)	2 | 3 (67%)	3 | 3 (100%)	4 | 3 (133%)
People	Build a performance driven culture	# projects started	2x	Mike Bowni	Unit	Yes	Increase is better	Monthly	1 | 5 (20%)	1 | 5 (20%)	1 | 5 (20%)	2 | 8 (25%)	3 | 8 (37%)	3 | 8 (37%)	3 | 9 (33%)	5 | 9 (56%)	5 | 9 (56%)	5 | 10 (50%)	9 | 10 (90%)	10 | 10 (100%)
Customers	Provide quality & innovative customer service	% Customers satisfaction	2x	Imran Khan	%	Yes	Increase is better	Semi-annual	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	60 | 70 (86%)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	90 | 85 (106%)
People	Attract retain & develop capable talent	% Employees Turnover	1x	Imran Khan	%	Yes	Decrease is better	Semi-annual	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	5 | 15 (300%)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	15 | 15 (100%)
Internal Process	Improve & automate efficient processes	% of IT Service tickets closed on time	1x	Imran Khan	%	Yes	Increase is better	Monthly	30 | 90 (33%)	40 | 90 (44%)	50 | 90 (56%)	60 | 90 (67%)	60 | 90 (67%)	60 | 90 (67%)	60 | 95 (63%)	60 | 95 (63%)	60 | 95 (63%)	70 | 95 (74%)	- | 95 (-)	100 | 95 (105%)
Customers	Increase customer base & products and services	% of customer left	2x	Nauman Khan		Yes	Decrease is better	Monthly	10 | 11 (110%)	11 | 15 (136%)	11 | 16 (145%)	11 | 17 (155%)	11 | 18 (164%)	12 | 20 (167%)	16 | 30 (187%)	16 | 31 (194%)	16 | 32 (200%)	18 | 33 (183%)	19 | 35 (184%)	20 | 35 (170%)
Finance	Optimize capital & operating expenditure	Average cost per FTE	1x	Alem Selimovic	Mill. USD	Yes	Decrease is better	Yearly	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	1.79 | 2.5 (140%)
People	Build a performance driven culture	Average employee satisfaction rating	1x	Alem Selimovic	%	No	Increase is better	Yearly	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	- | - (-)	65 | 75 (87%)
People	Attract retain & develop capable talent	Average training hours per FTE	1x	Imran Khan	Hour	Yes	Increase is better	Monthly	5 | 5 (100%)	5 | 5 (100%)	5 | 5 (100%)	- | 10 (-)	5 | 10 (50%)	6 | 10 (60%)	6 | 10 (60%)	6 | 10 (60%)	6 | 15 (40%)	8 | 15 (53%)	10 | 15 (67%)	10 | 15 (67%)
Customers	Increase customer base & products	Awareness has	1x	Sasi Kasa	new	Yes	Increase is	Quarterly	- | -	- | -	60 | 80	- | -	- | -	65 | 90	- | -	- | -	70 | 95	- | -	- | -	75 | 100

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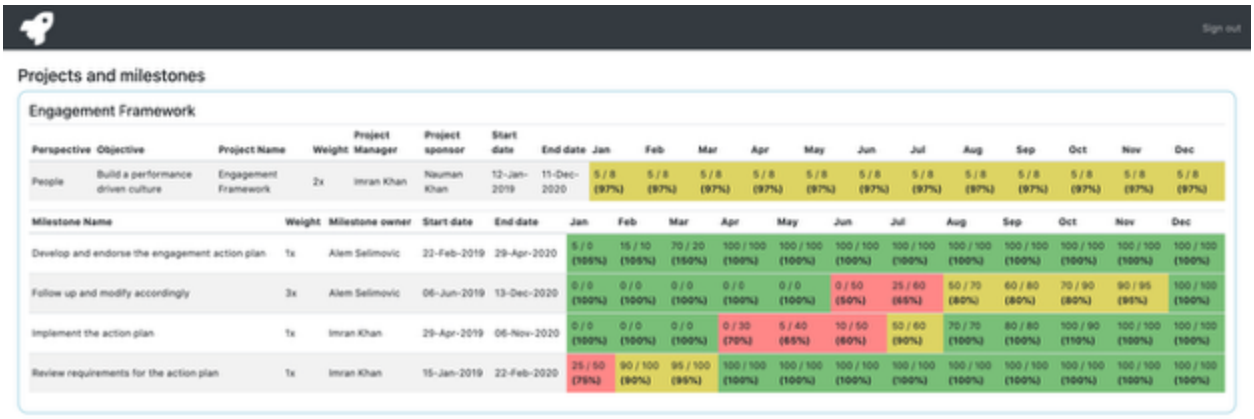


Projects and milestones

Engagement Framework

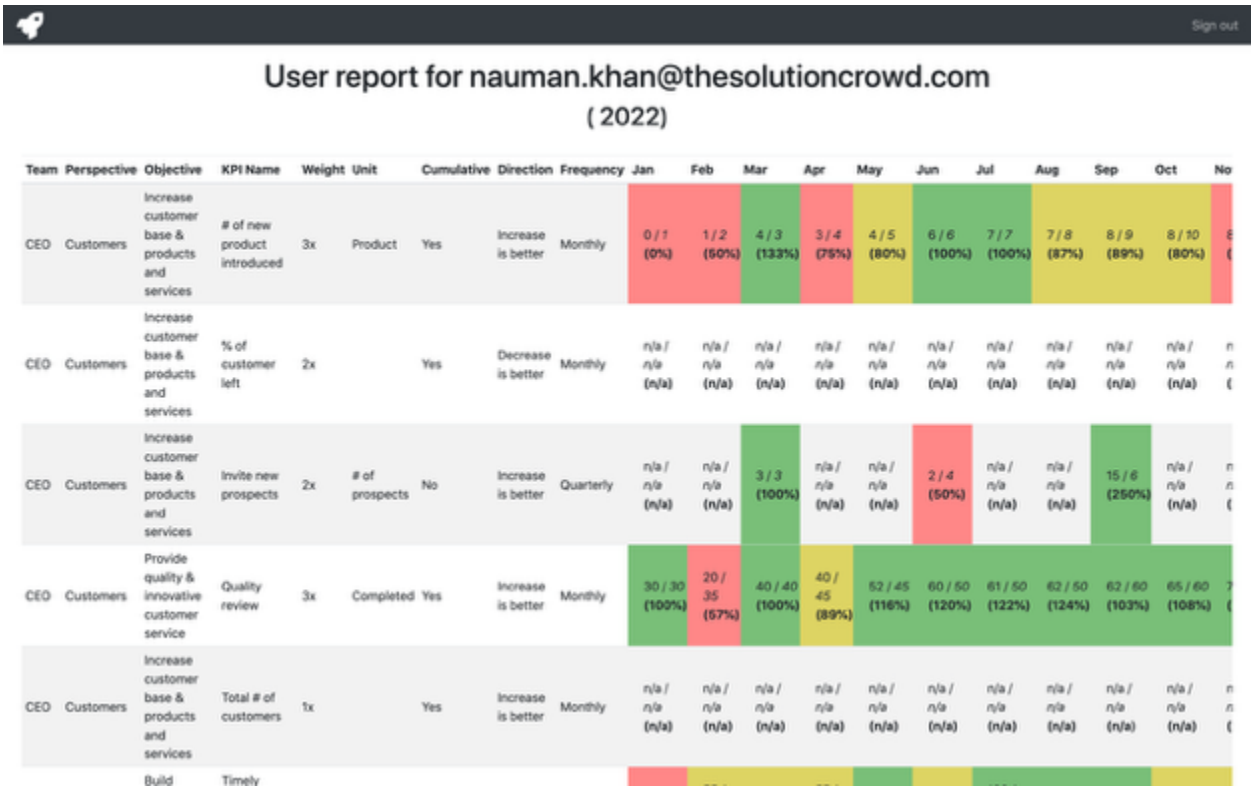
Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Build a performance driven culture	Engagement Framework	2x	Imran Khan	Nauman Khan	12-Jan-2019	11-Dec-2020	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)	5 / 8 (97%)

Milestone Name	Weight	Milestone owner	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Develop and endorse the engagement action plan	1x	Alem Selimovic	22-Feb-2019	29-Apr-2020	5 / 0 (105%)	15 / 10 (105%)	70 / 20 (150%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)
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%)
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 (85%)	10 / 50 (80%)	50 / 60 (90%)	70 / 70 (100%)	80 / 80 (100%)	100 / 90 (110%)	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%)

Human Capital Development

Perspective	Objective	Project Name	Weight	Project Manager	Project sponsor	Start date	End date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
People	Attract retain & develop capable talent	Human Capital Development	1x	Alem Selimovic	Nauman Khan	12-Jan-2019	12-Oct-2020	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)	8 / 13 (95%)

Milestone Name	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%)
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%)
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 / 60 (120%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)
Provide training based on annual training plan	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 (105%)	60 / 50 (110%)	80 / 60 (120%)	100 / 70 (130%)	100 / 100 (100%)	100 / 100 (100%)	100 / 100 (100%)



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	No
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%)	
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)	
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)	
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%)	
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)	
		Build	Timely																

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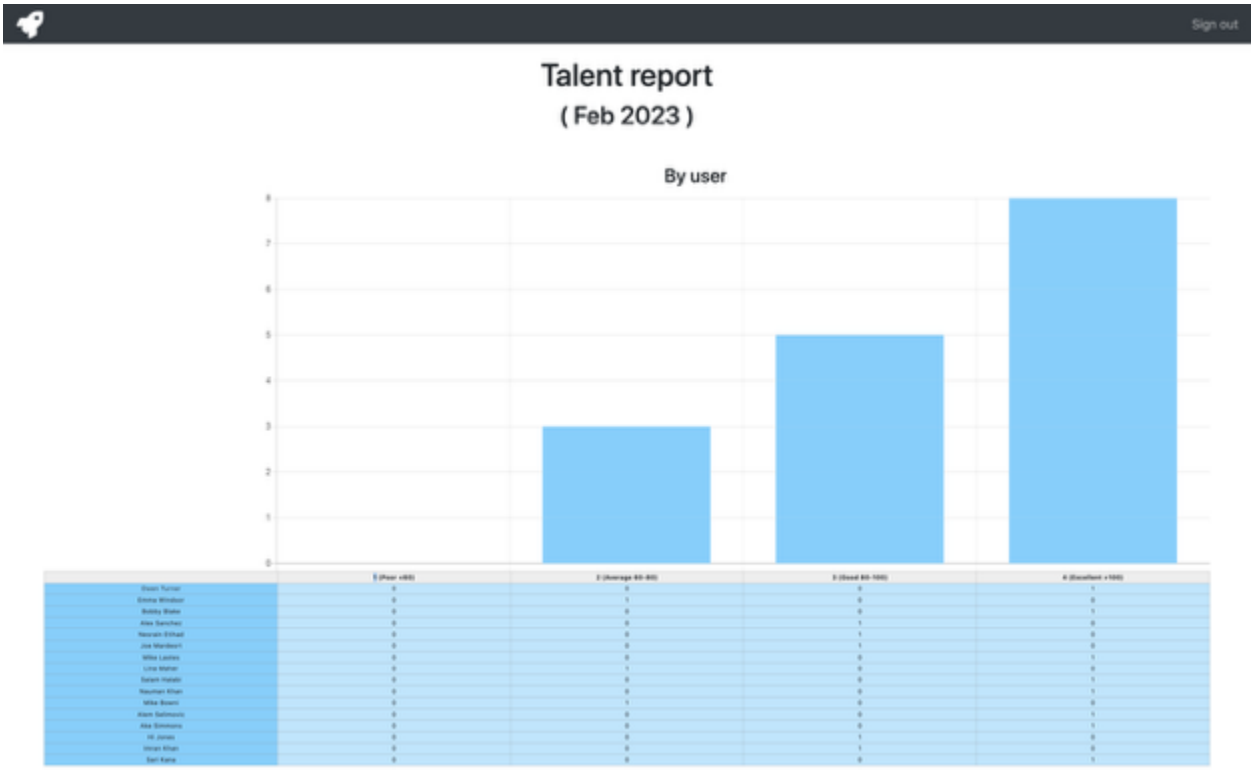
Talent reports

See talent grouped by ratings – all fully configurable.



By various dimensions.

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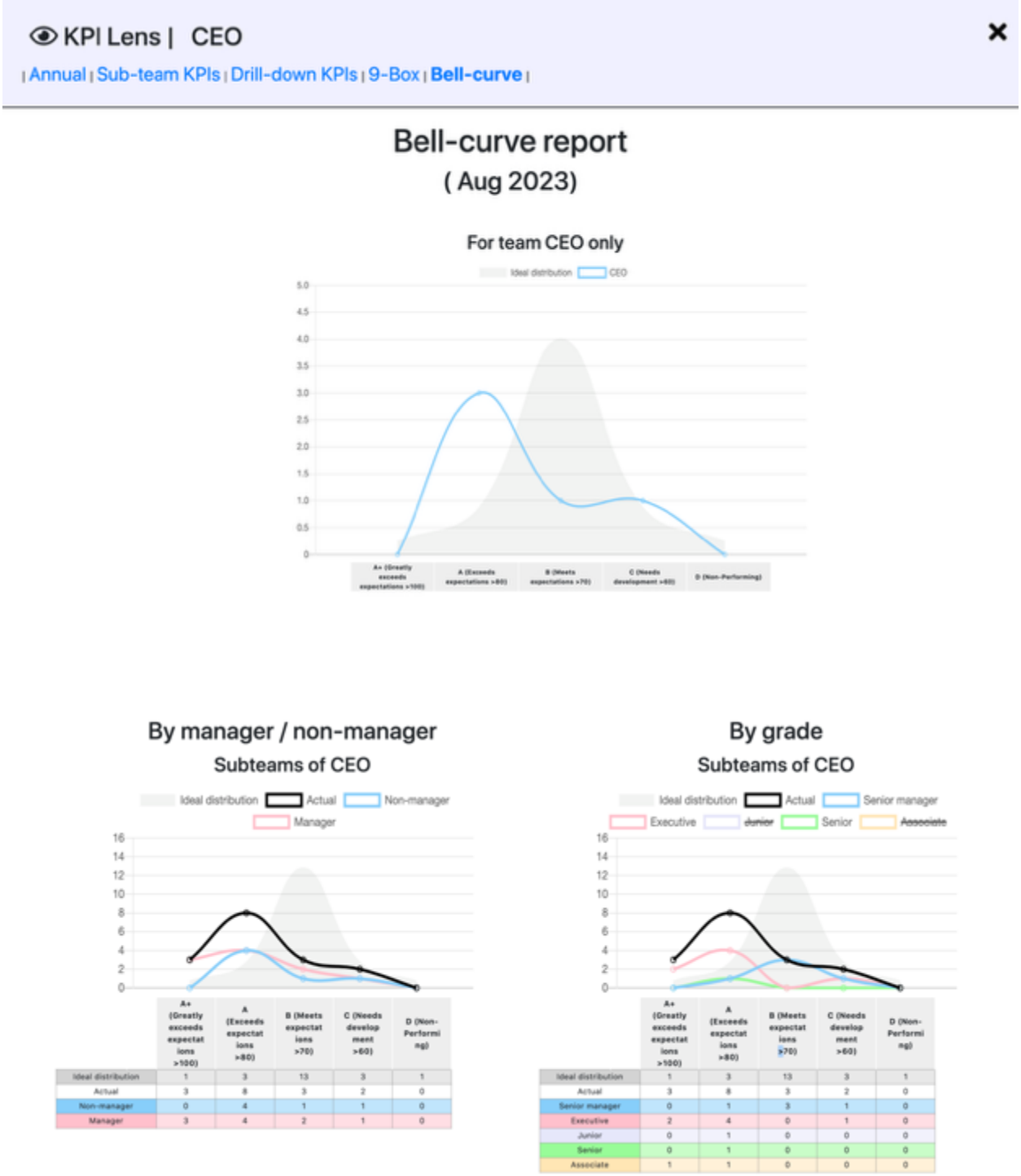
Bell-curves

See appraisals grouped on bell-curves.



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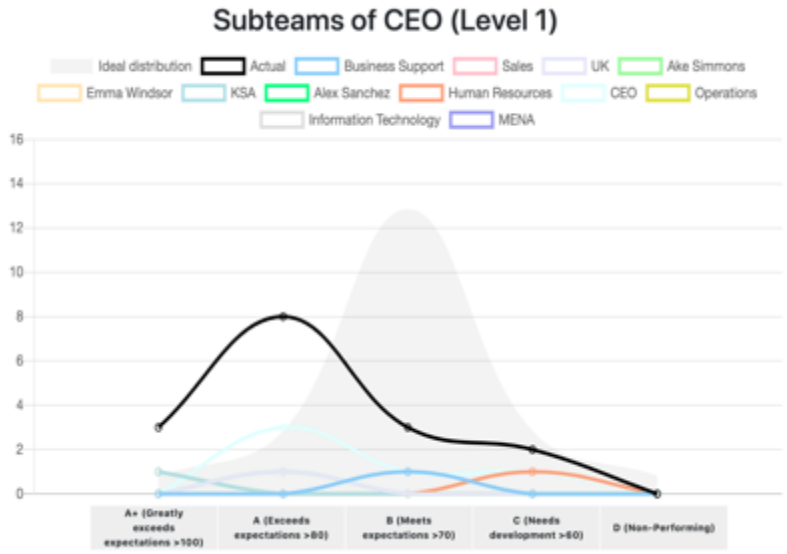

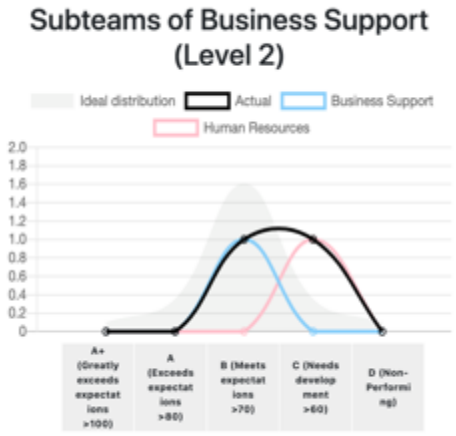

Vertical reports

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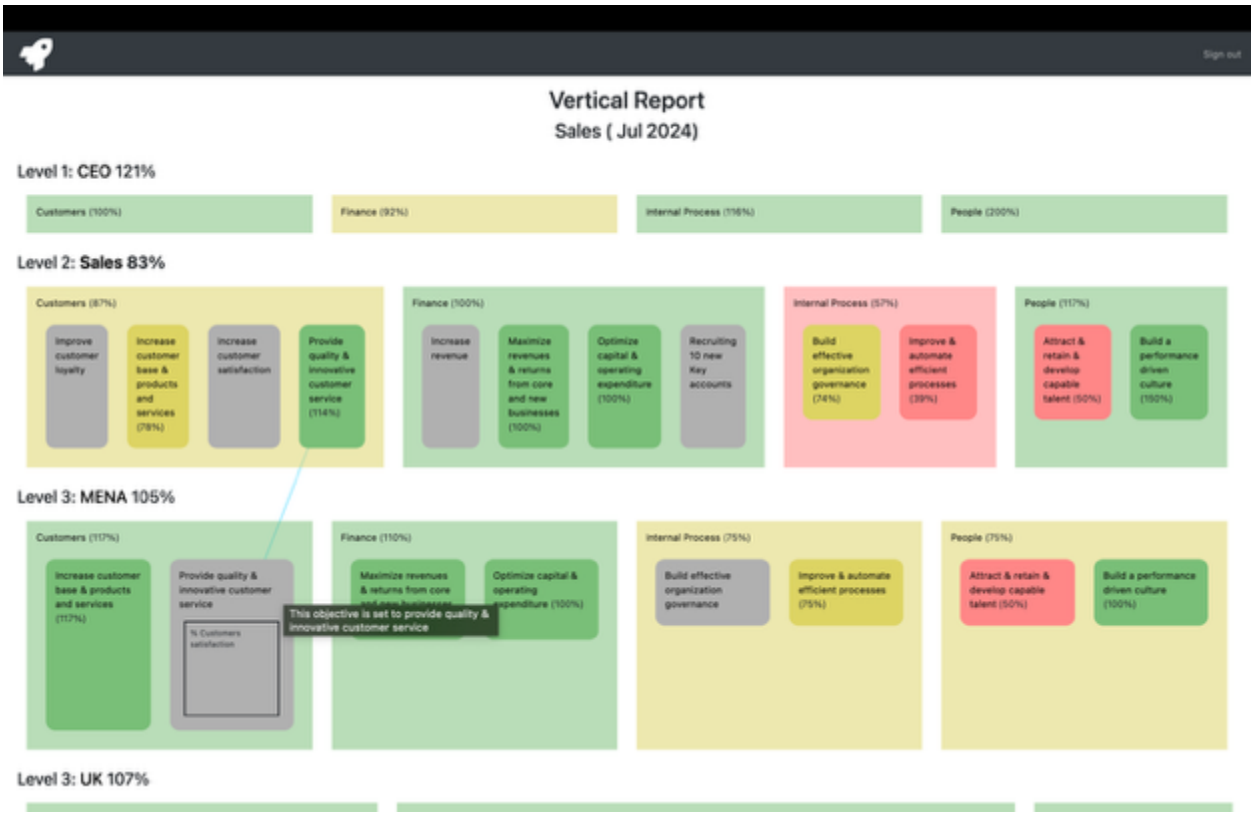

Look up and down through your organisation by focusing on a team, perspective or objective (cascading by parent team objective links).

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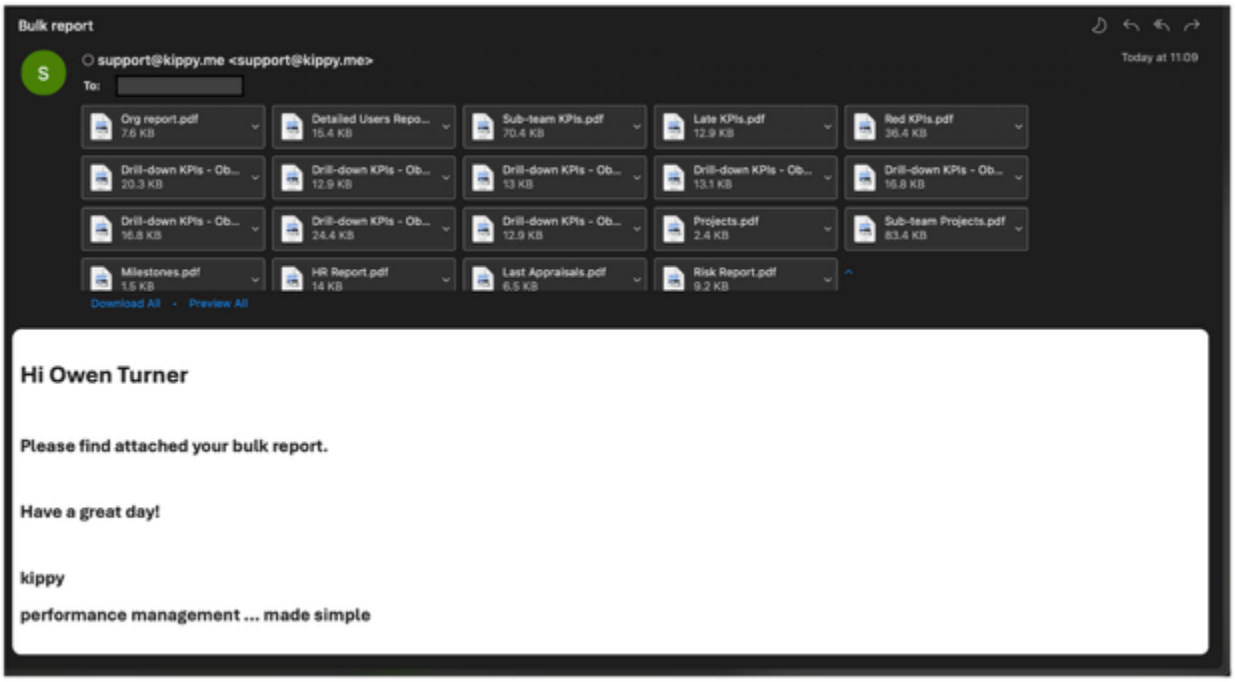
Scheduled reports

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.

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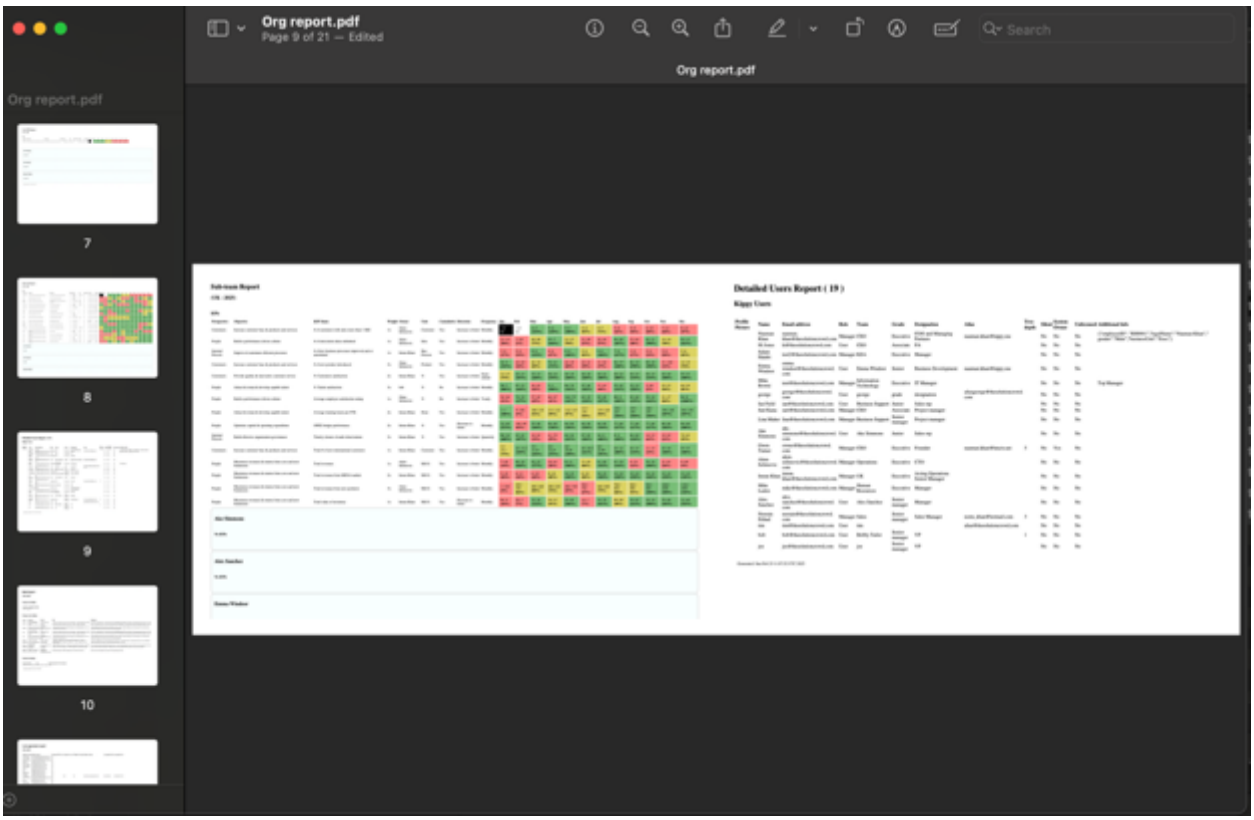

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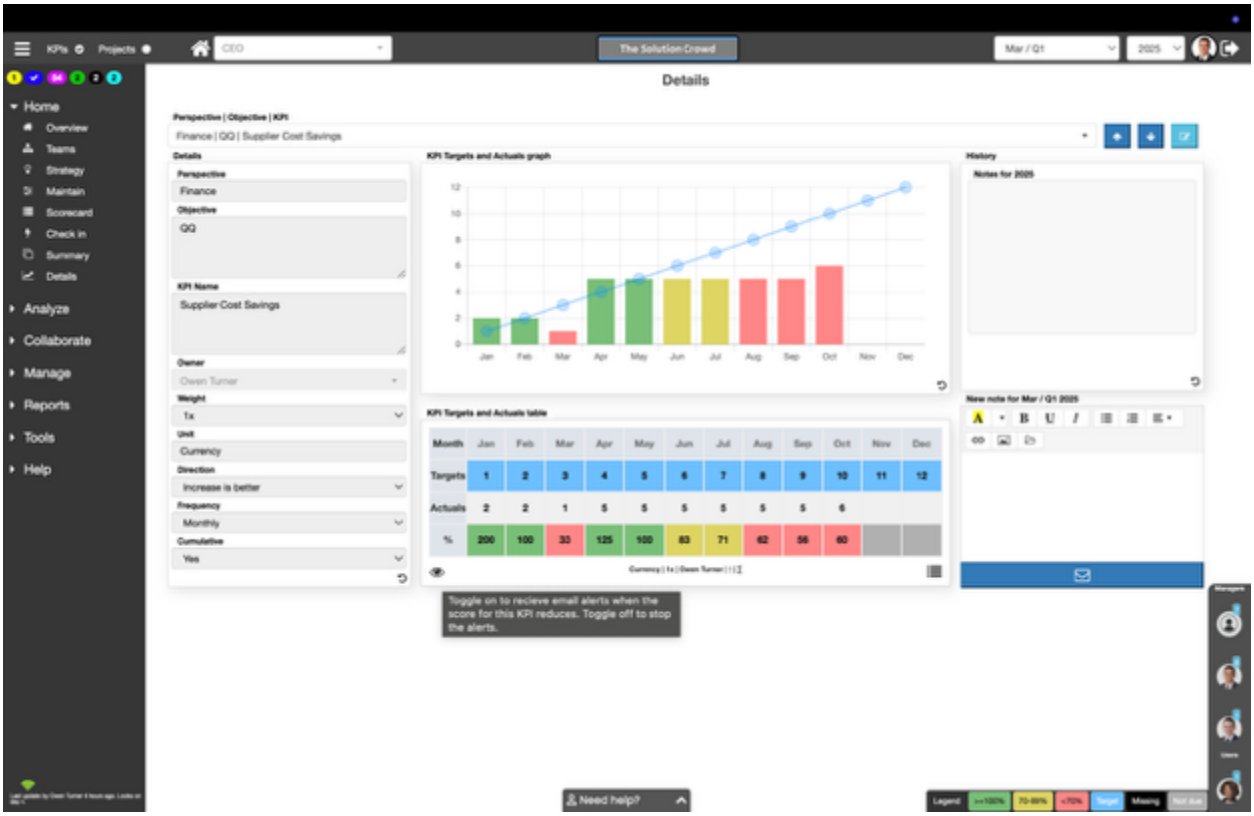
Watch List

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.

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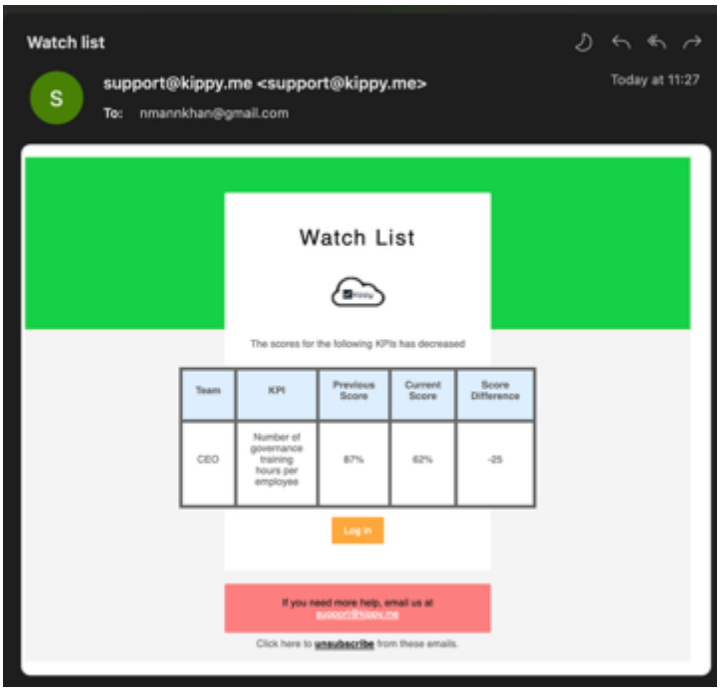

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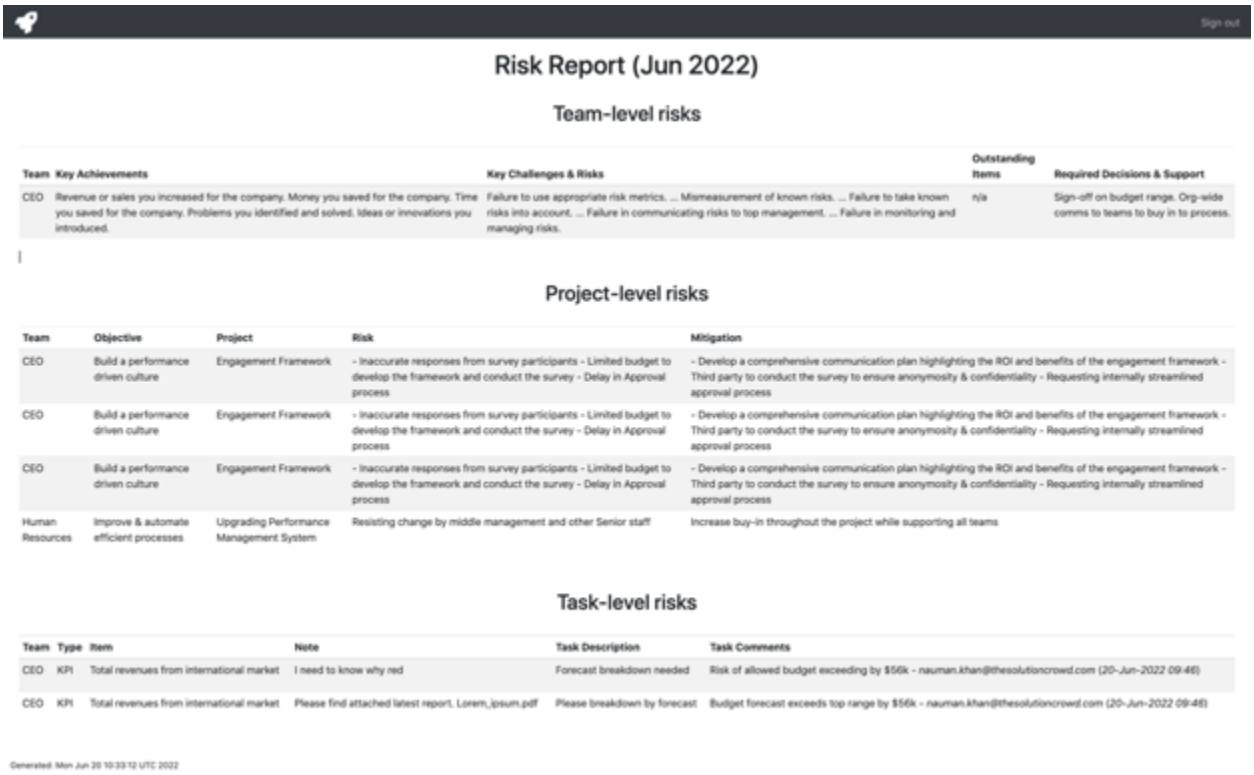
Risk Management

Risk Report

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

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



Sign out

Risk Report (Jun 2022)

Team-level risks

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

Project-level risks

Team	Objective	Project	Risk	Mitigation
CEO	Build a performance driven culture	Engagement Framework	- Inaccurate responses from survey participants - Limited budget to develop the framework and conduct the survey - Delay in Approval process	- Develop a comprehensive communication plan highlighting the ROI and benefits of the engagement framework - Third party to conduct the survey to ensure anonymosity & 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 anonymosity & 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 anonymosity & 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

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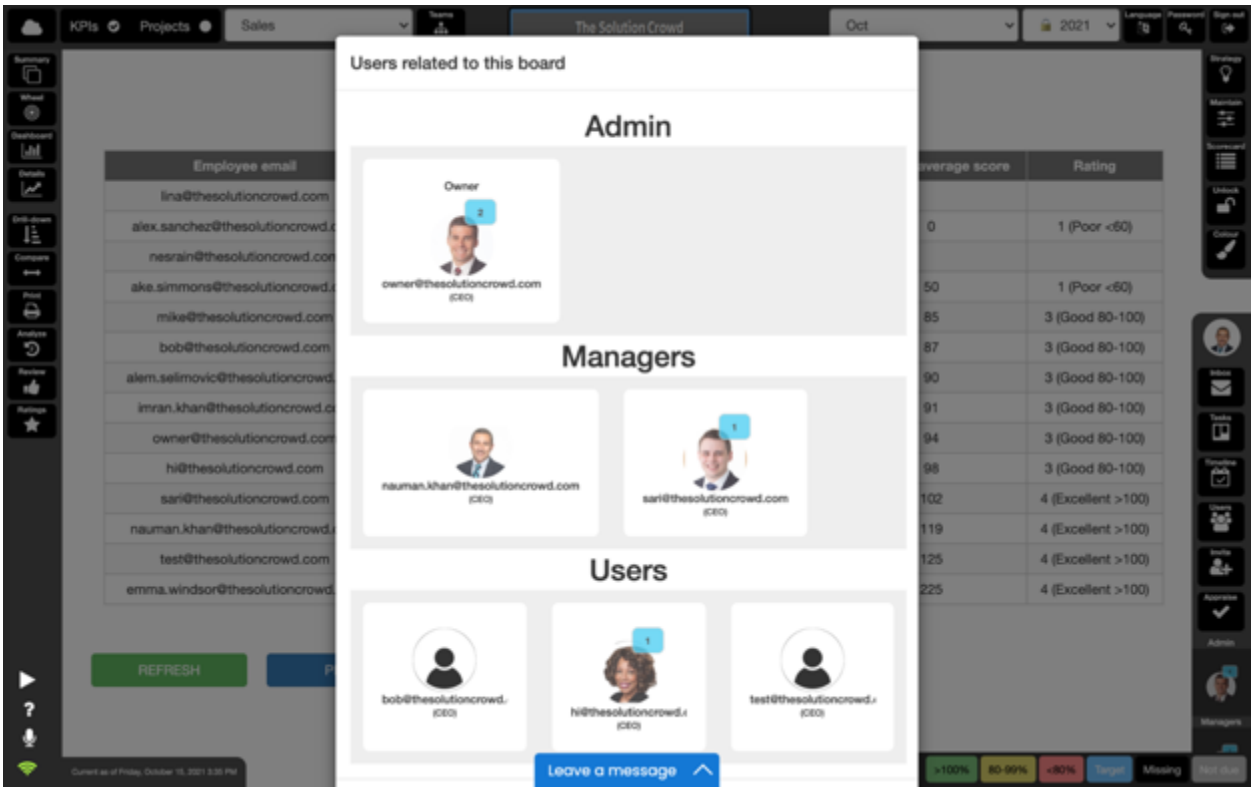
Governance

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.

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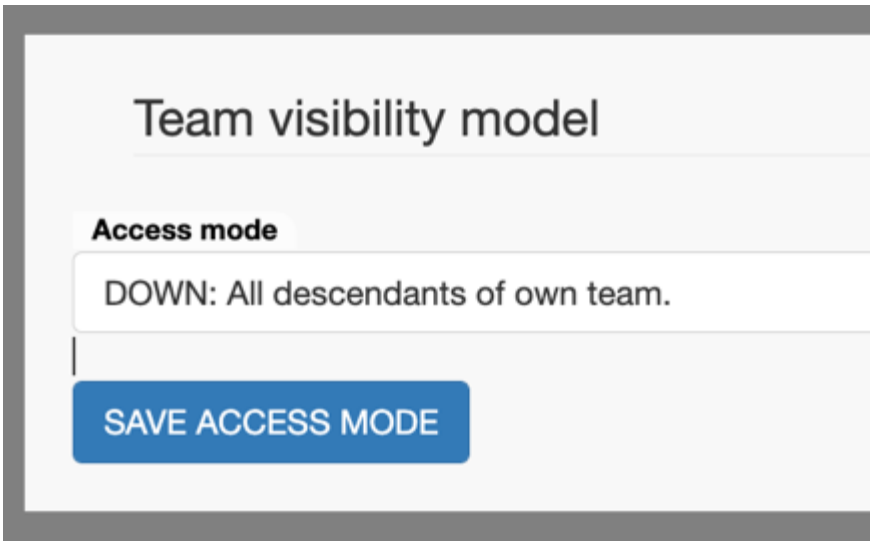
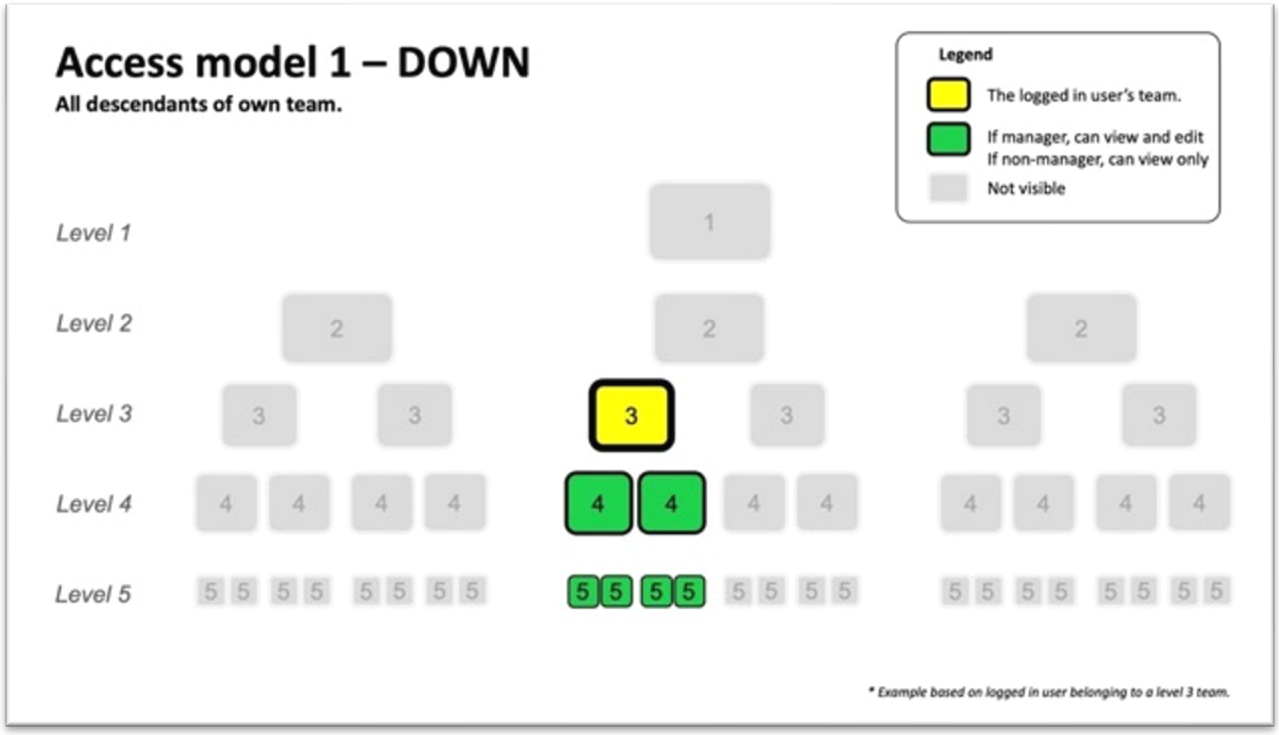


The 5 access modes are explained below. These can be customized further, as per specific requirements.



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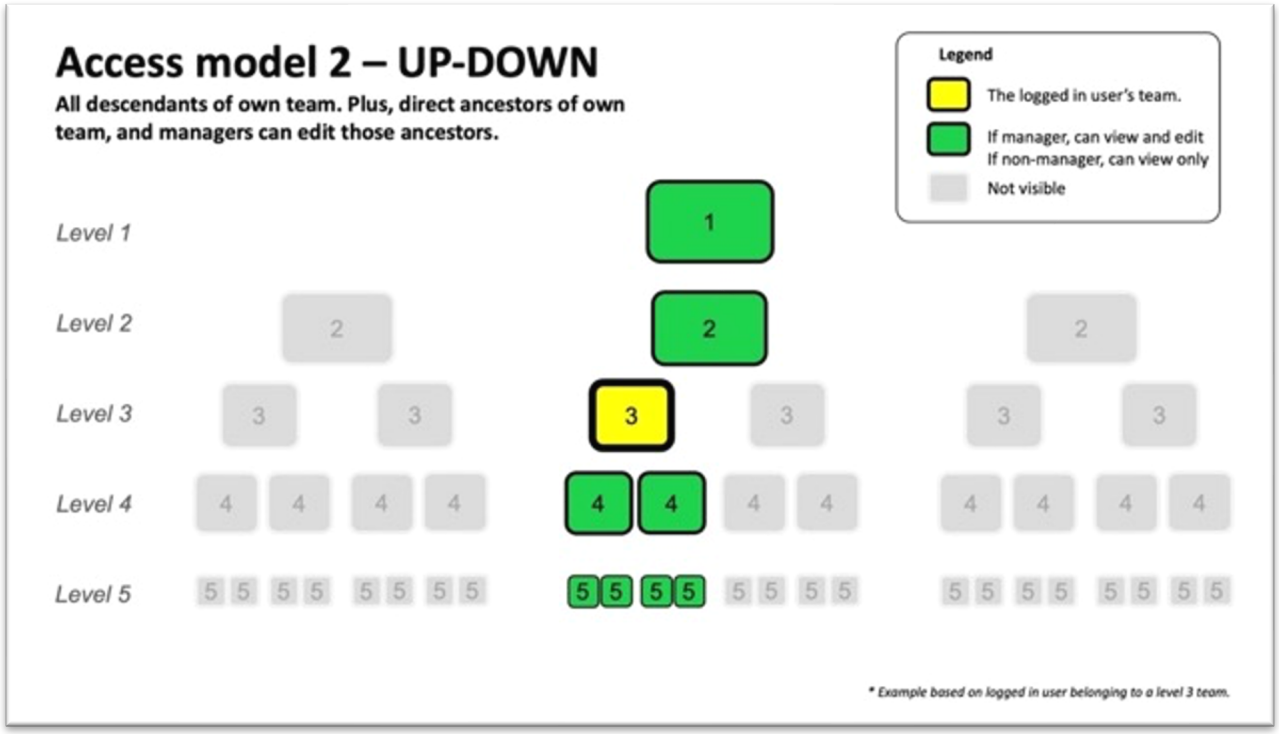

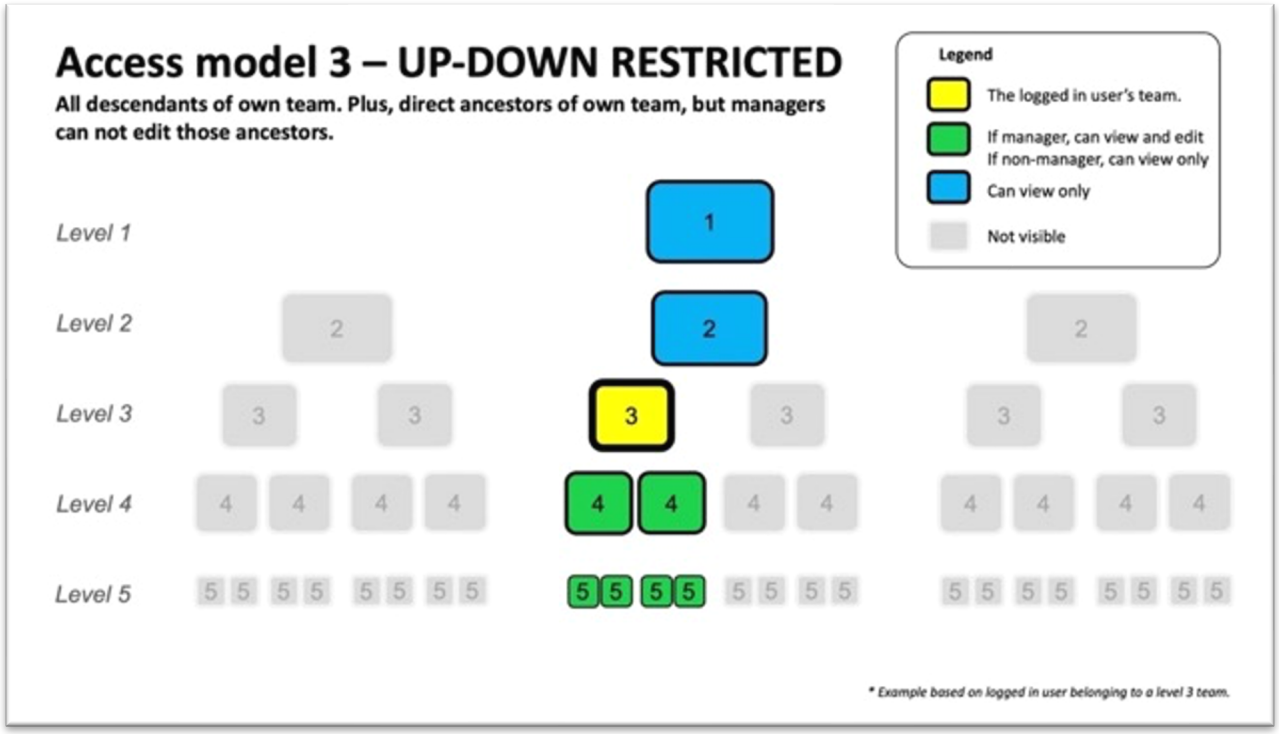

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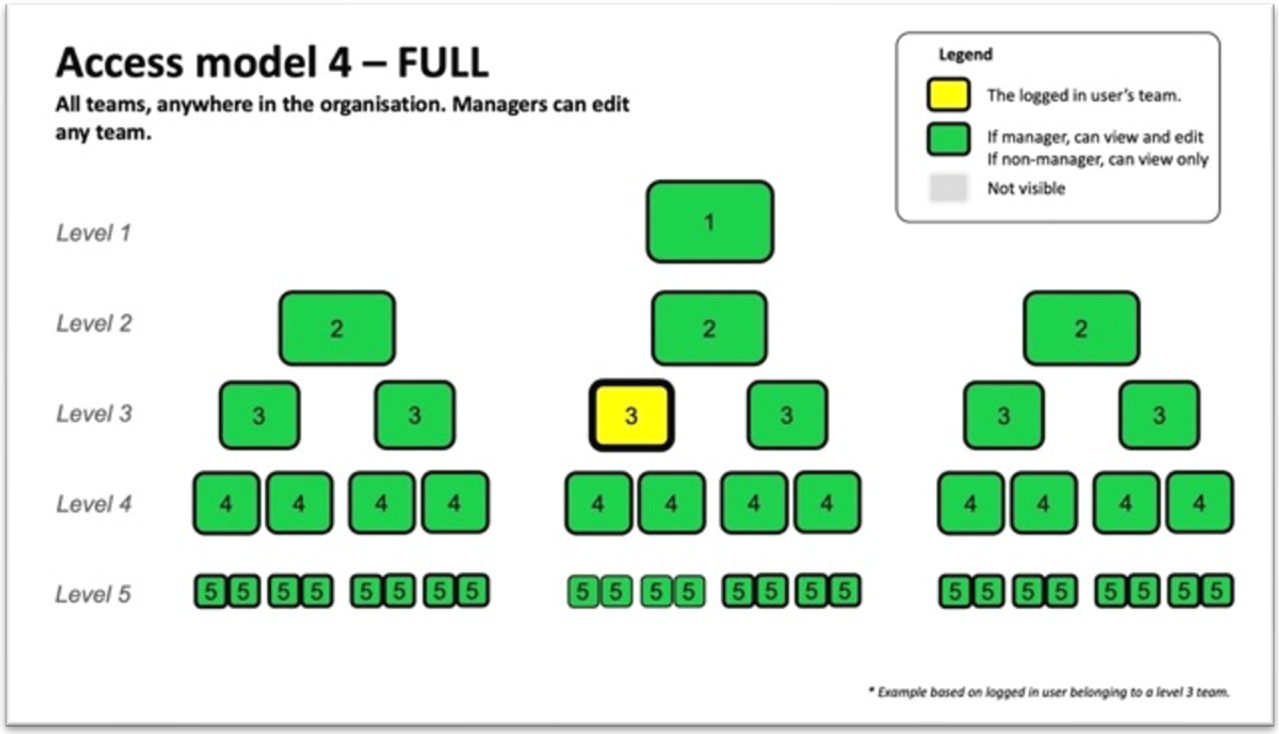

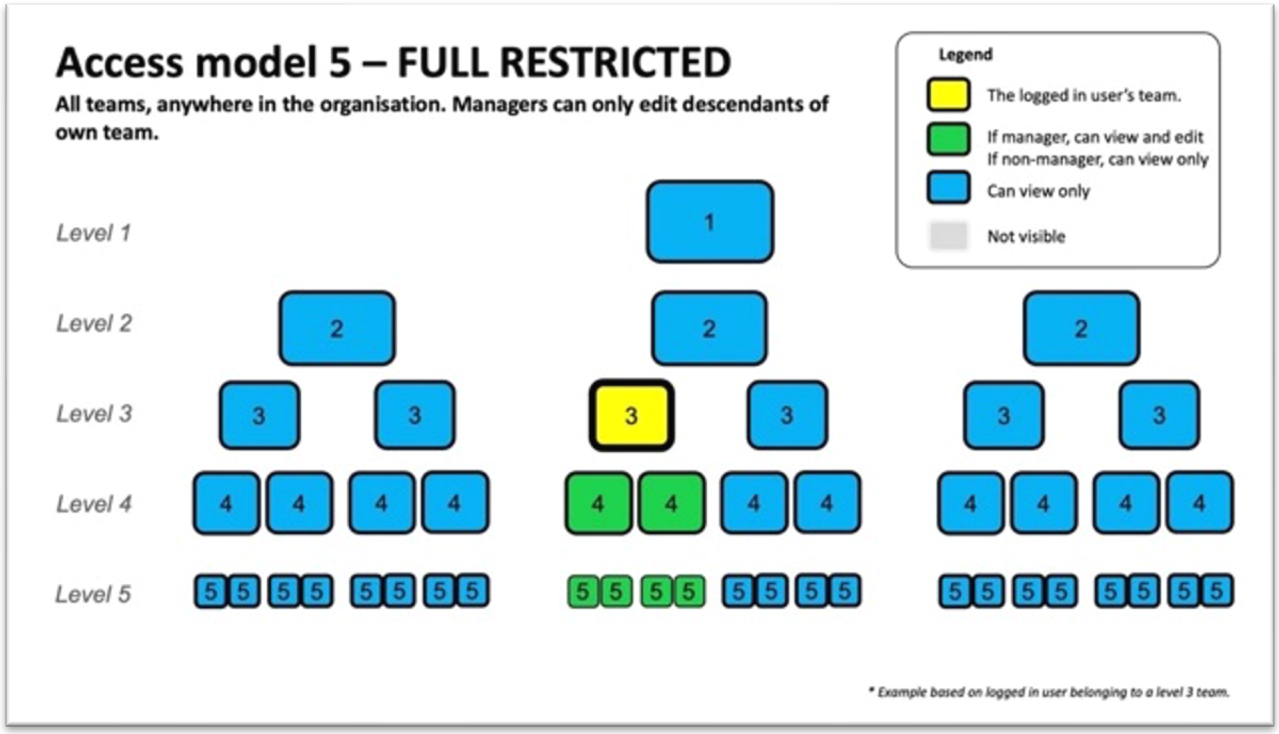

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Cross-functional teams

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.

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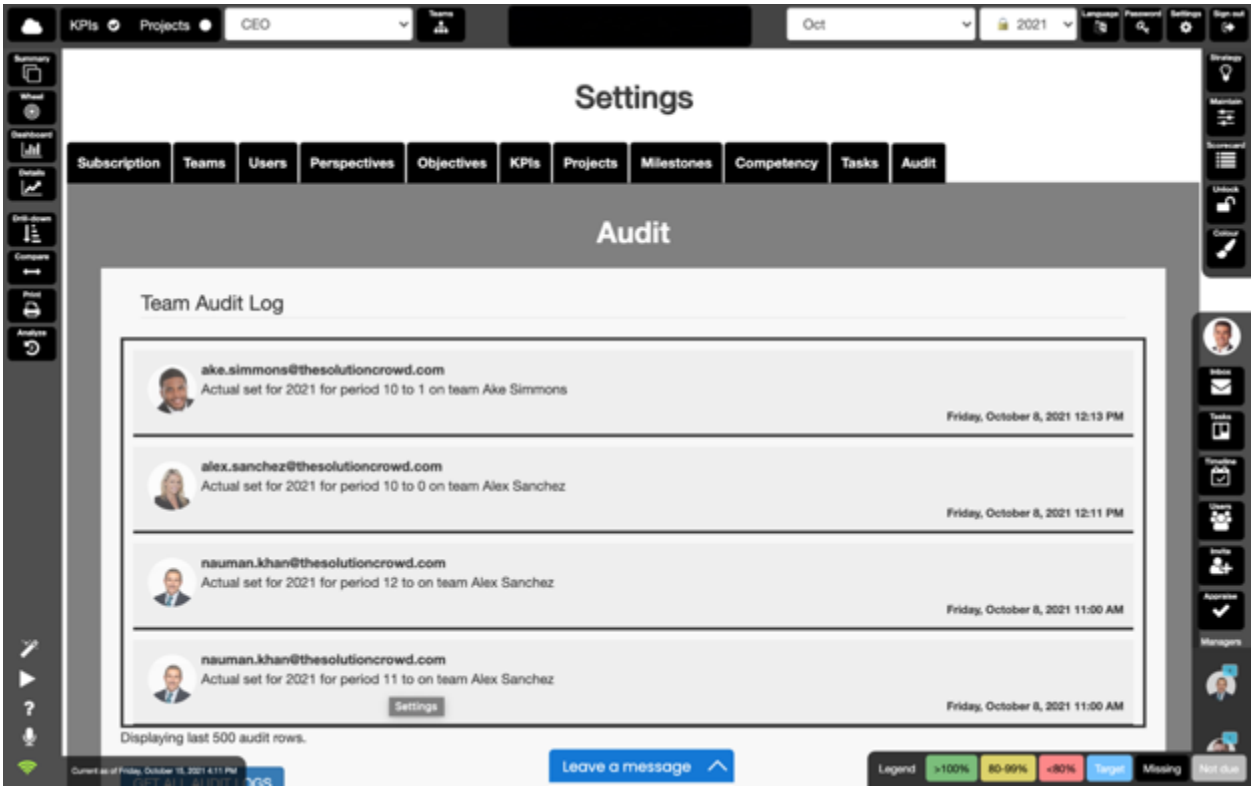
Auditing

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.

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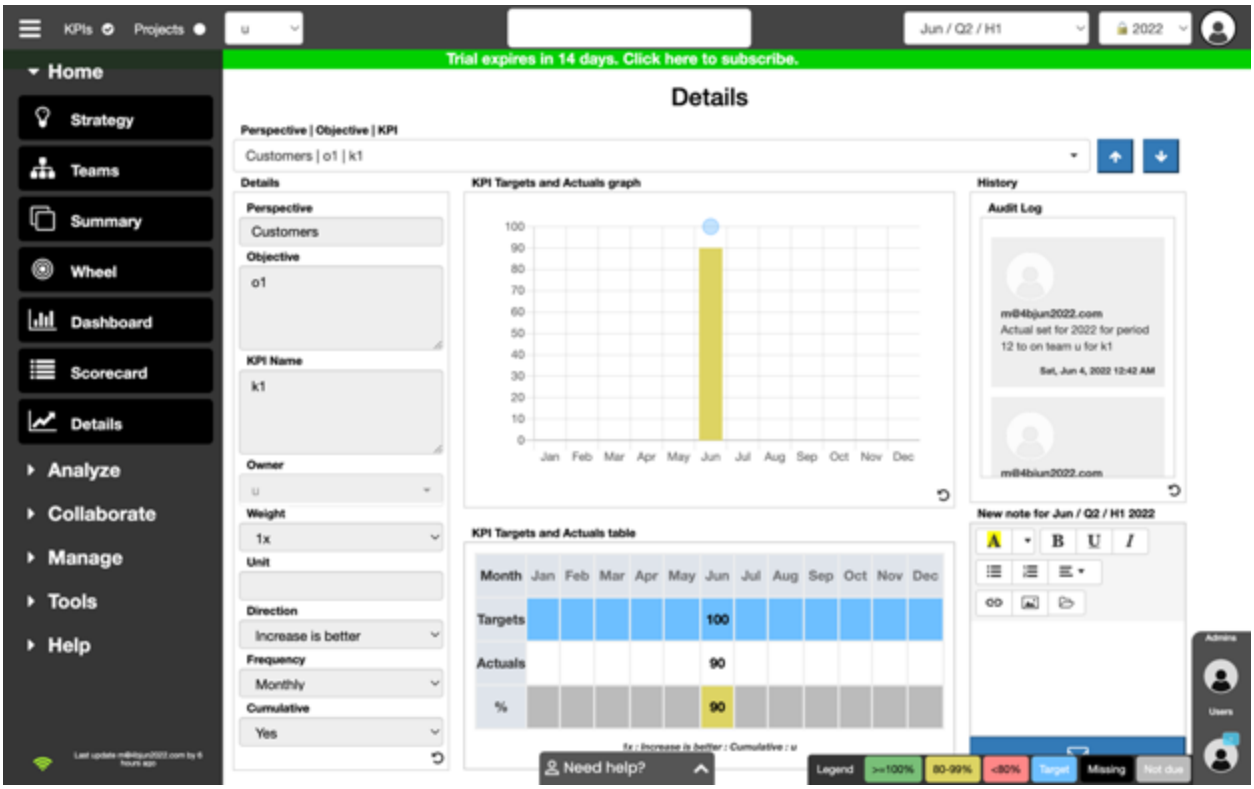

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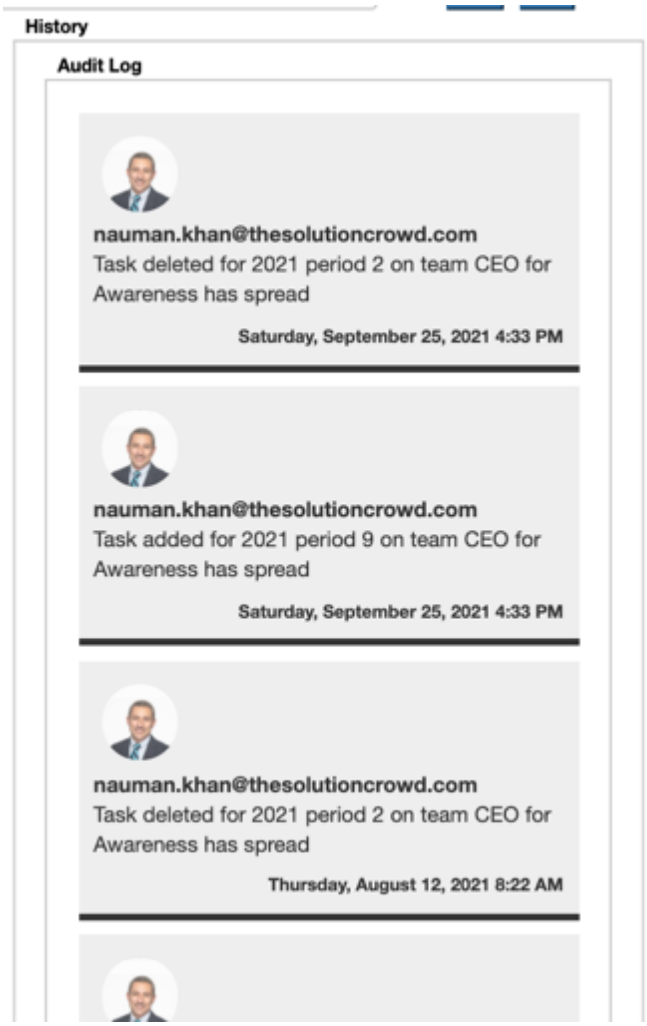

Every appraisal is logged.

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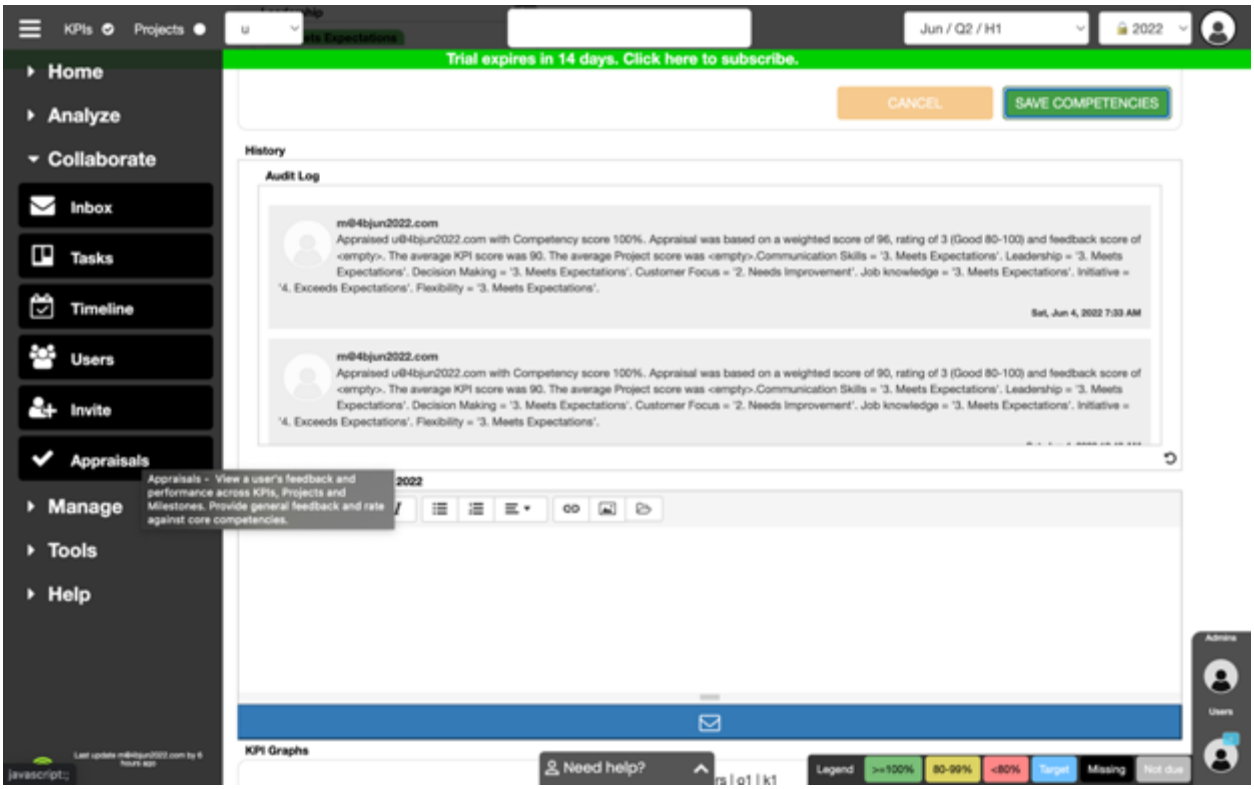

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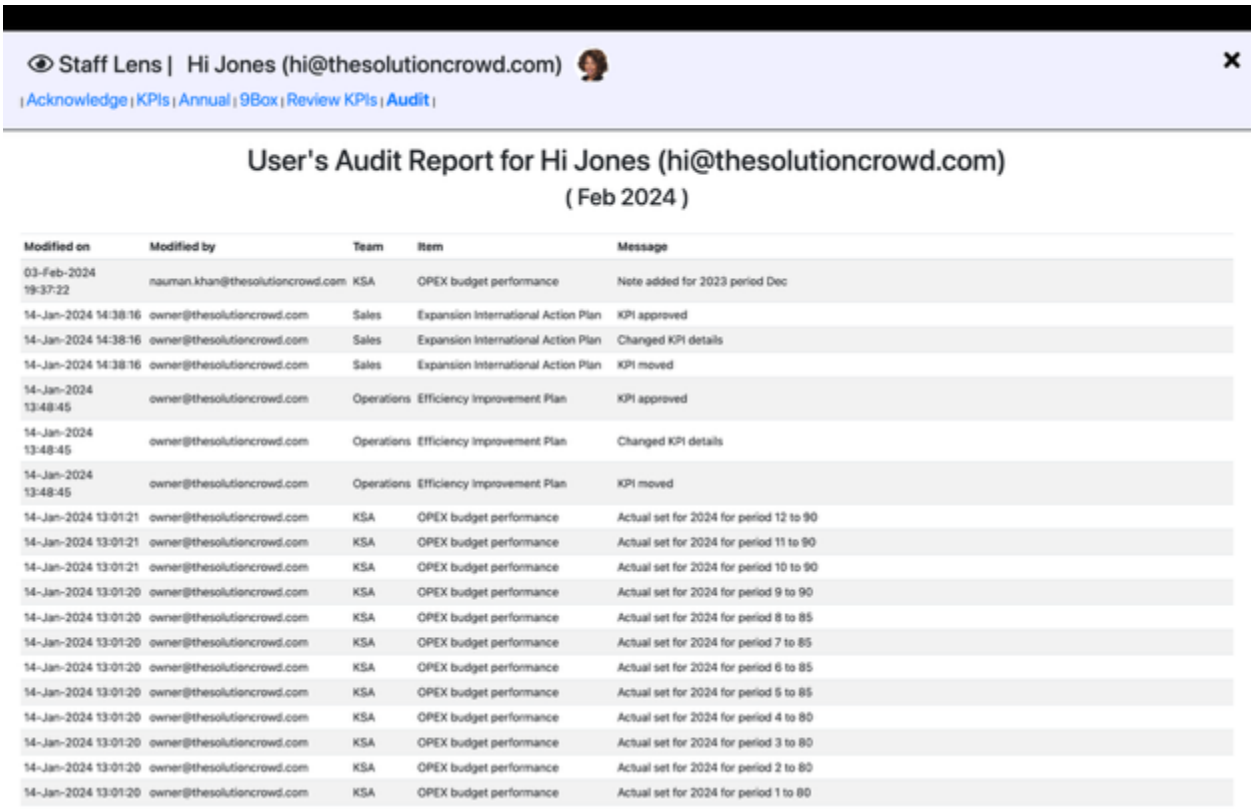

Change log report

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.

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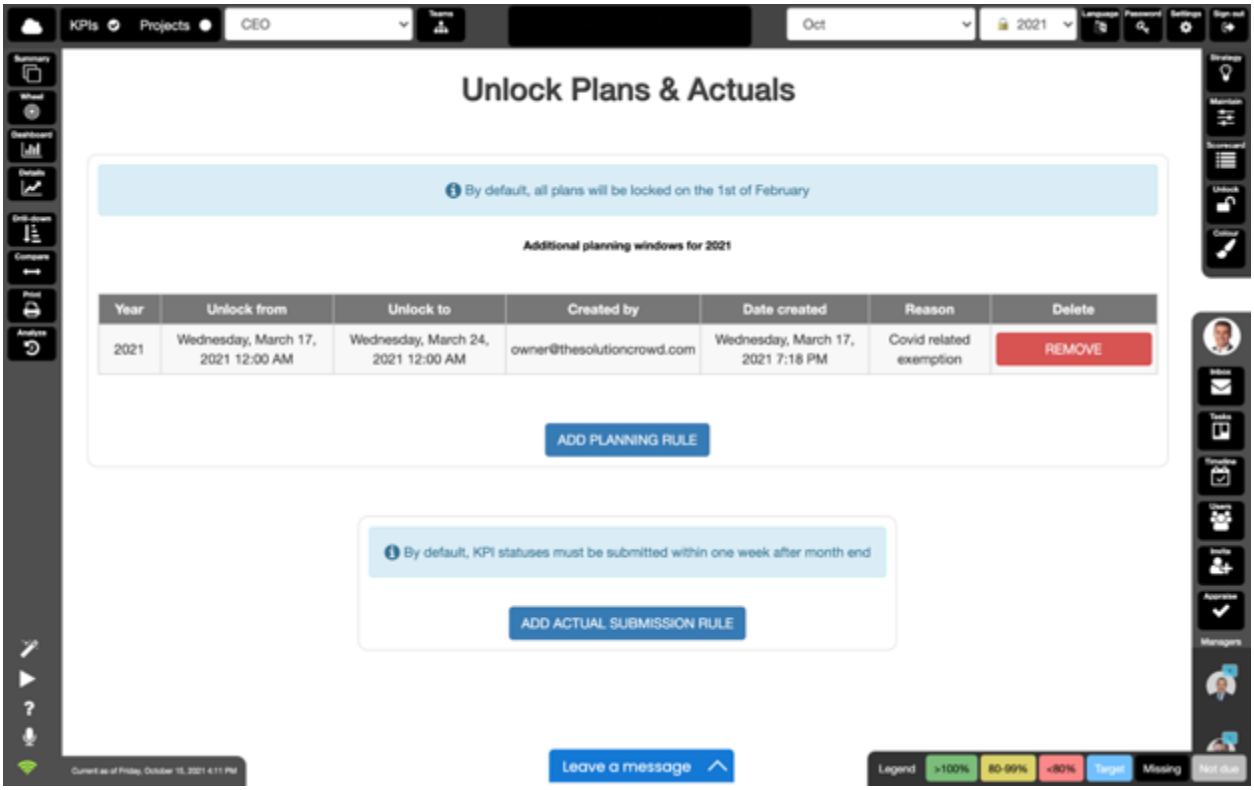
Change freezes

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
-



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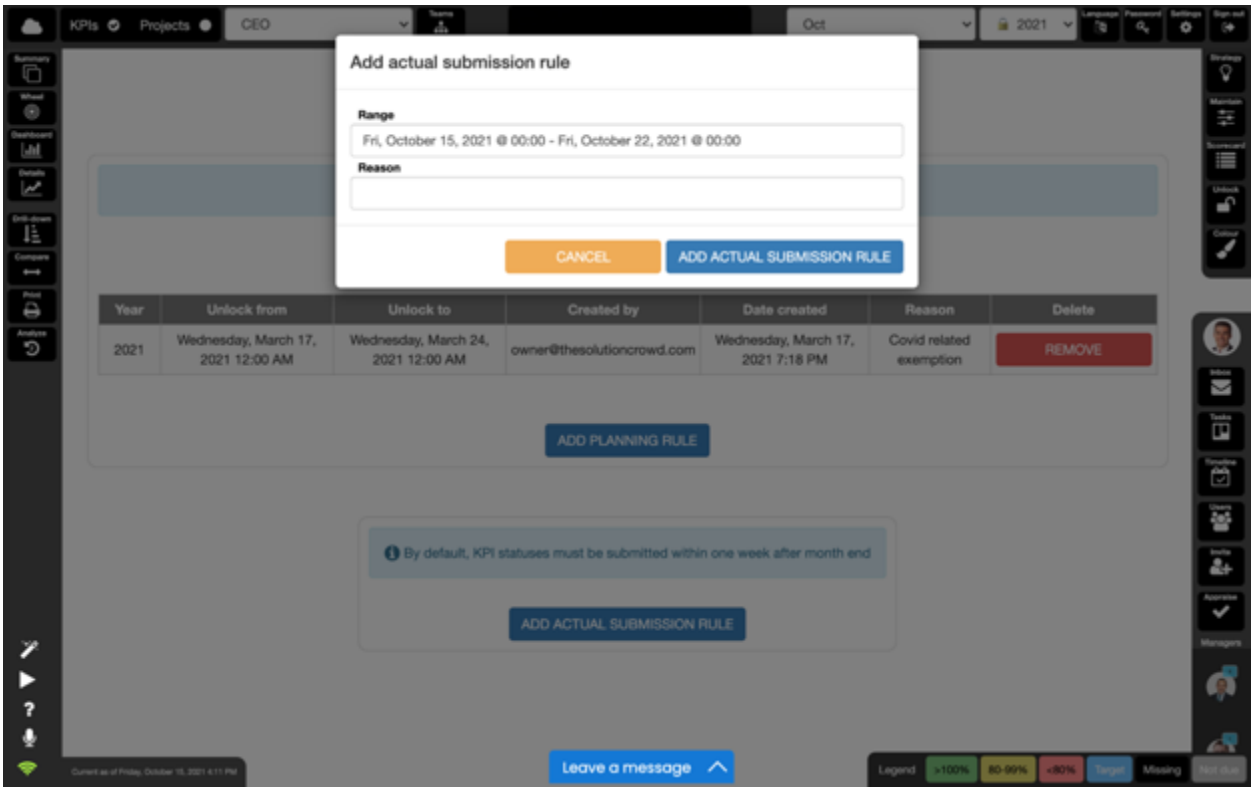

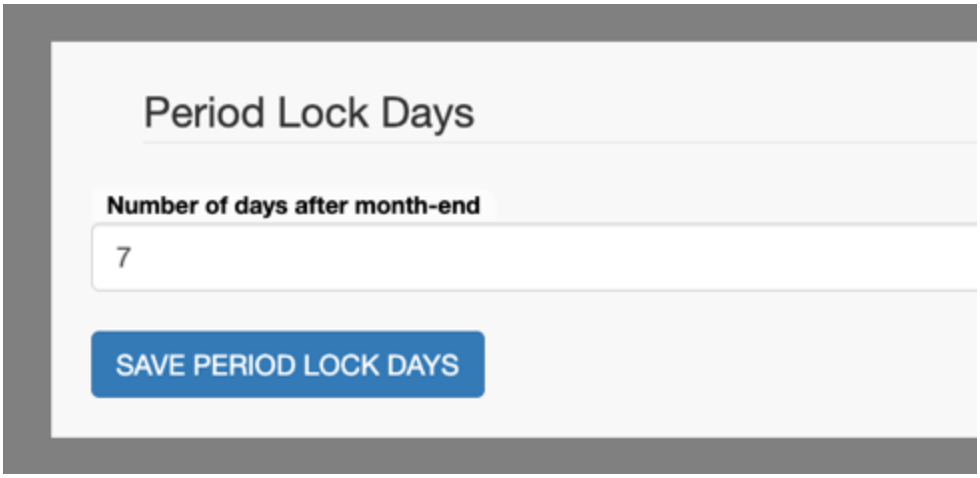

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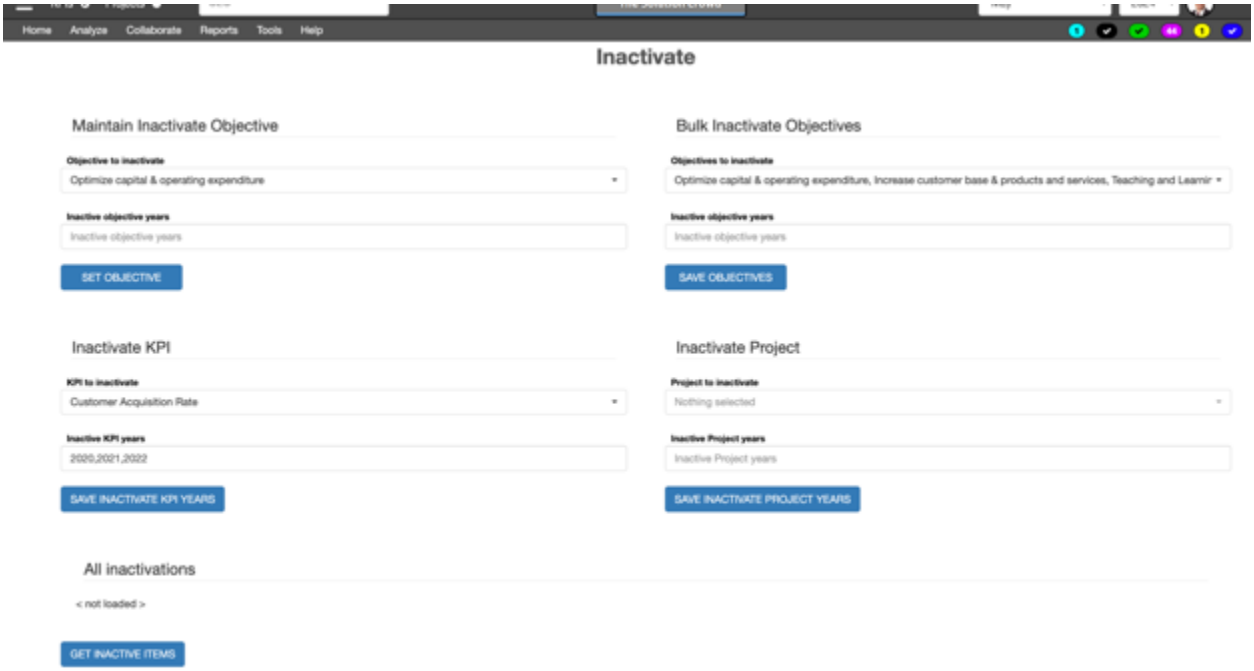
Inactivations

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



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

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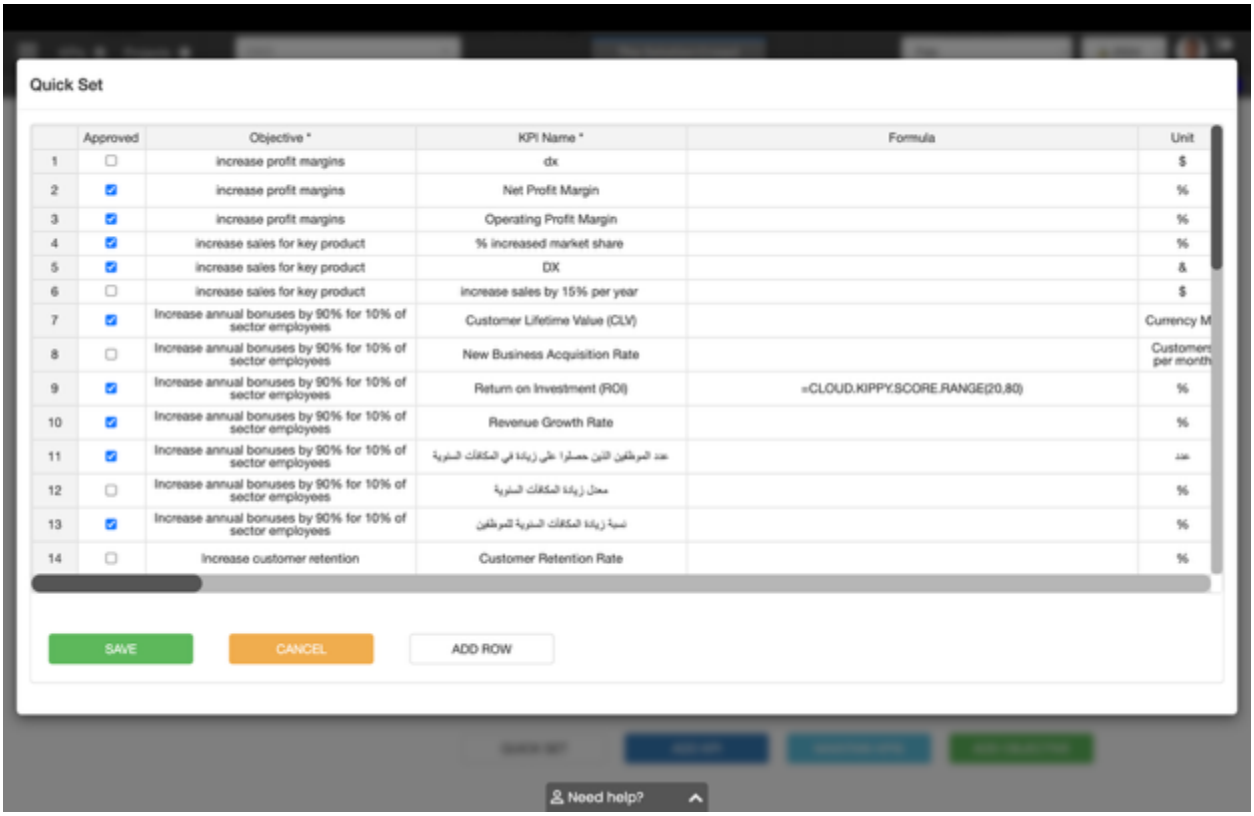
Quick set-up

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.



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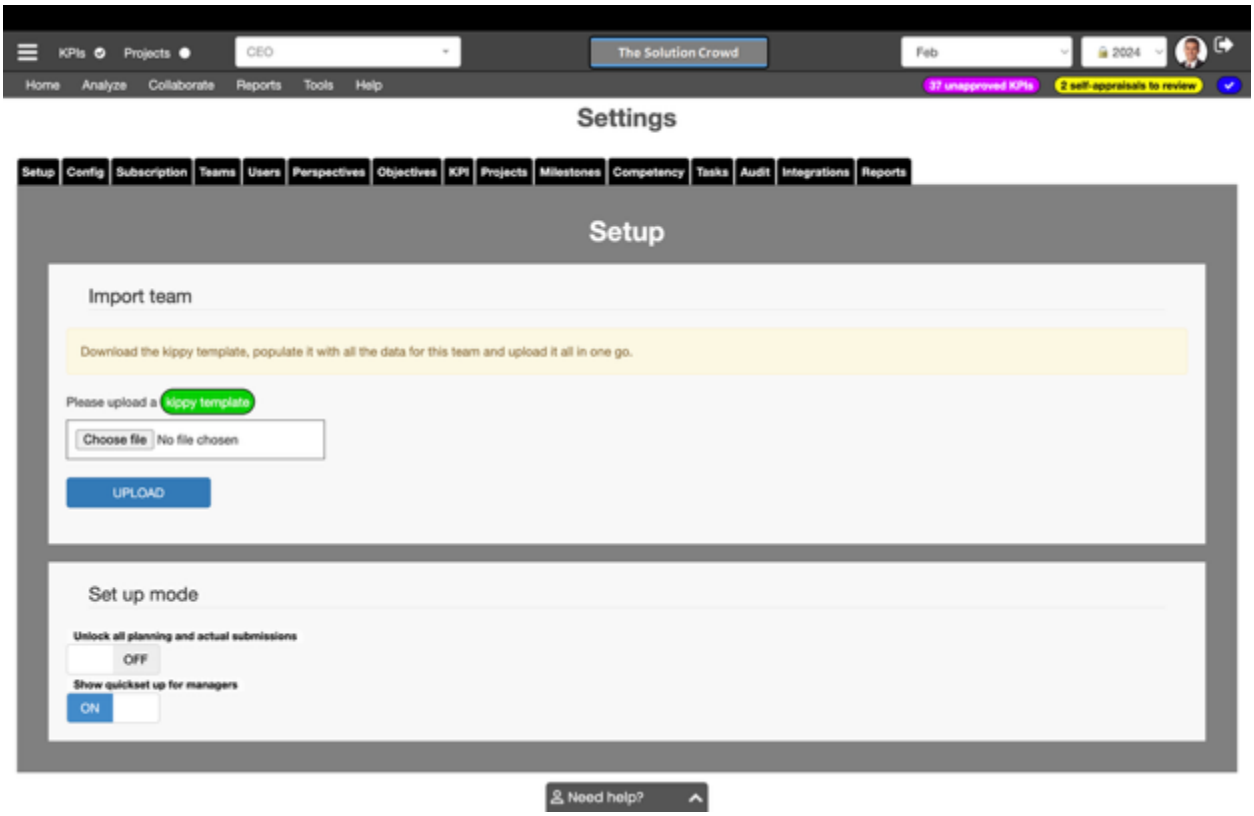

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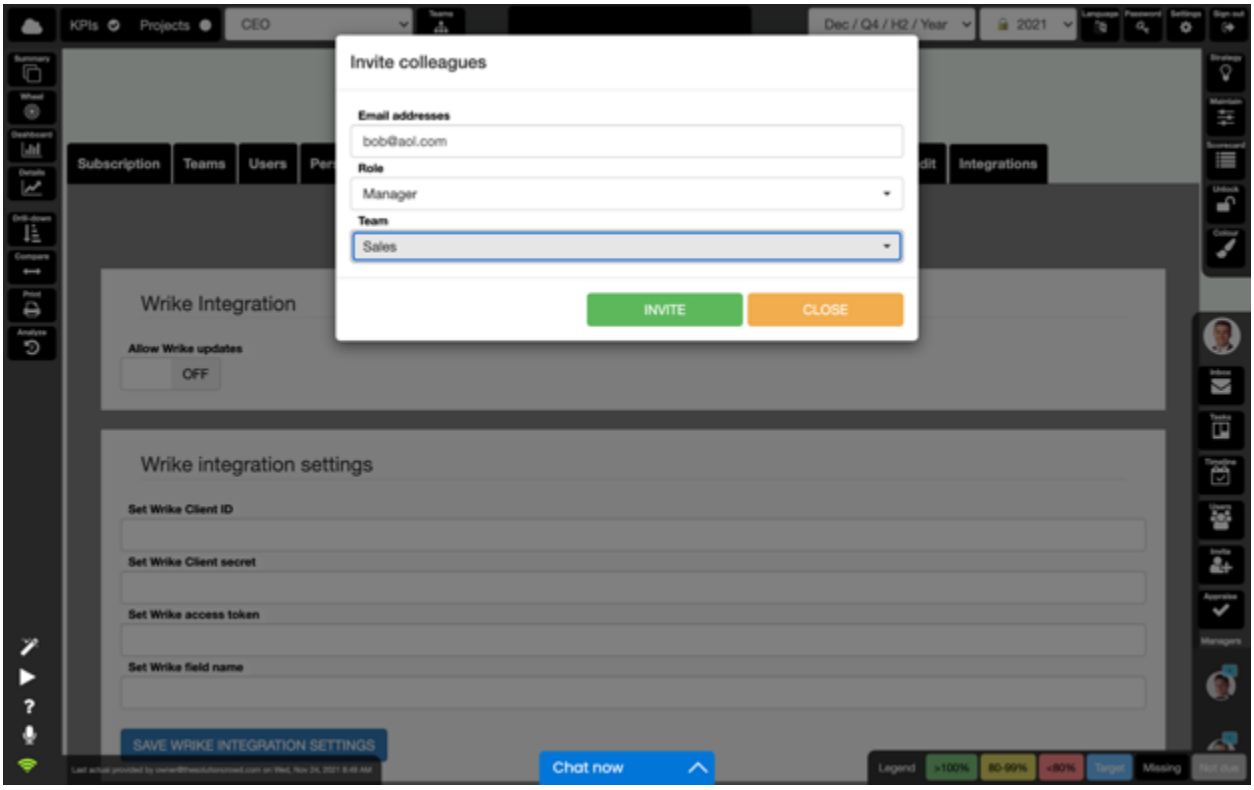
User management

Simple in-app management

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



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

Users can be added with alias email addresses, as silent (so not receive any email notifications) , 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.

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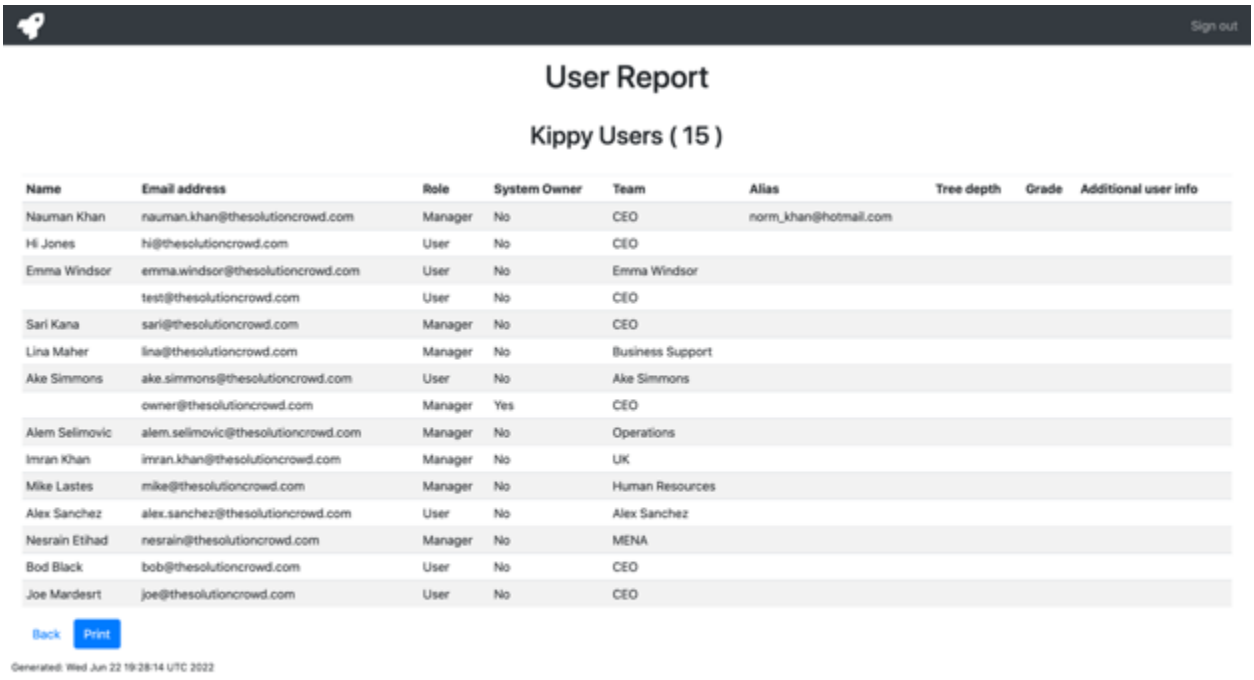
View all users in one report.



Manage your own user profile

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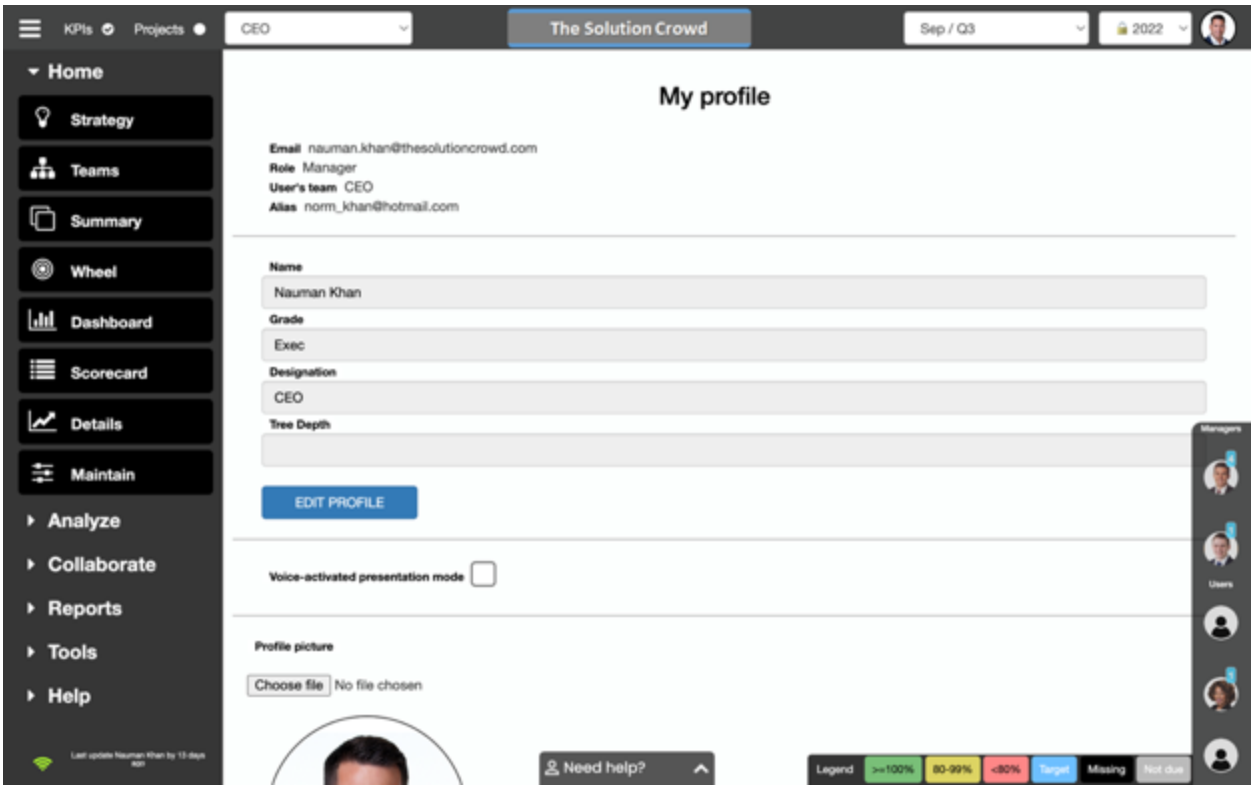

Manage profile of your teams' users

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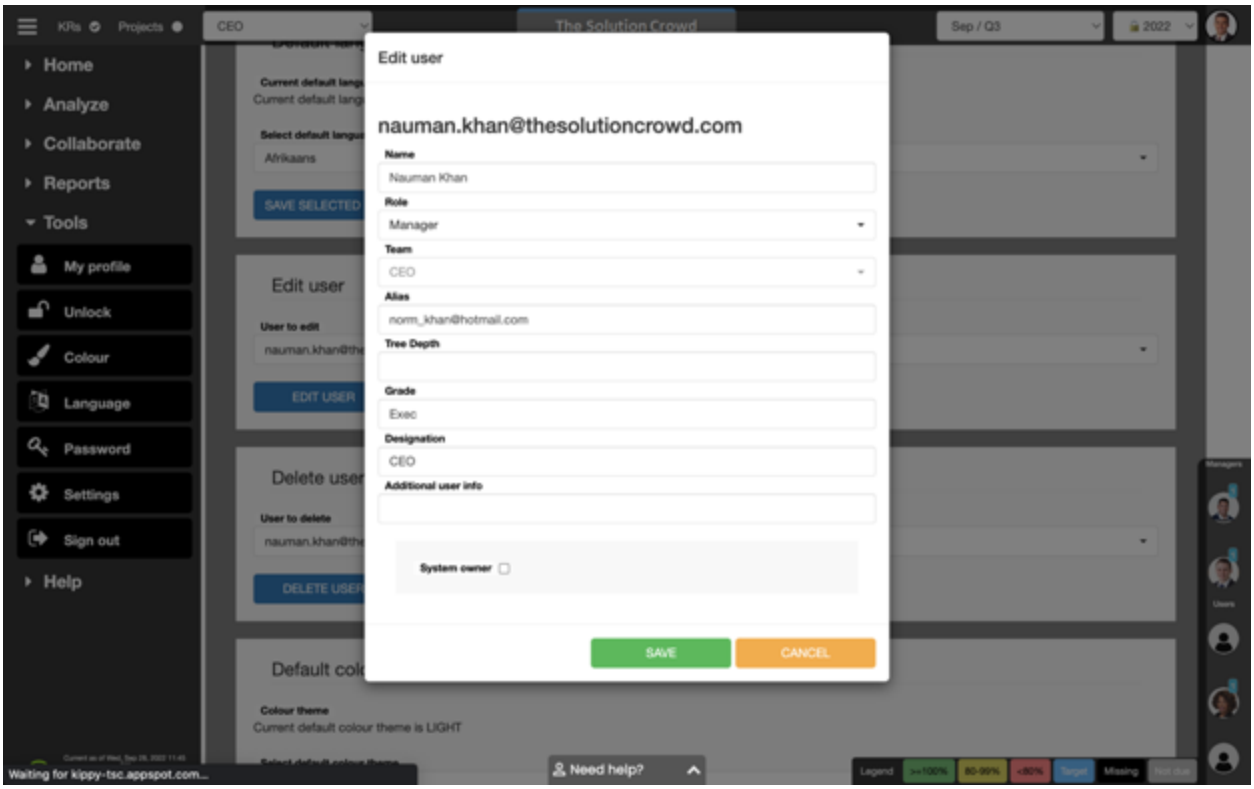

Augment dashboards with additional user info

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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.

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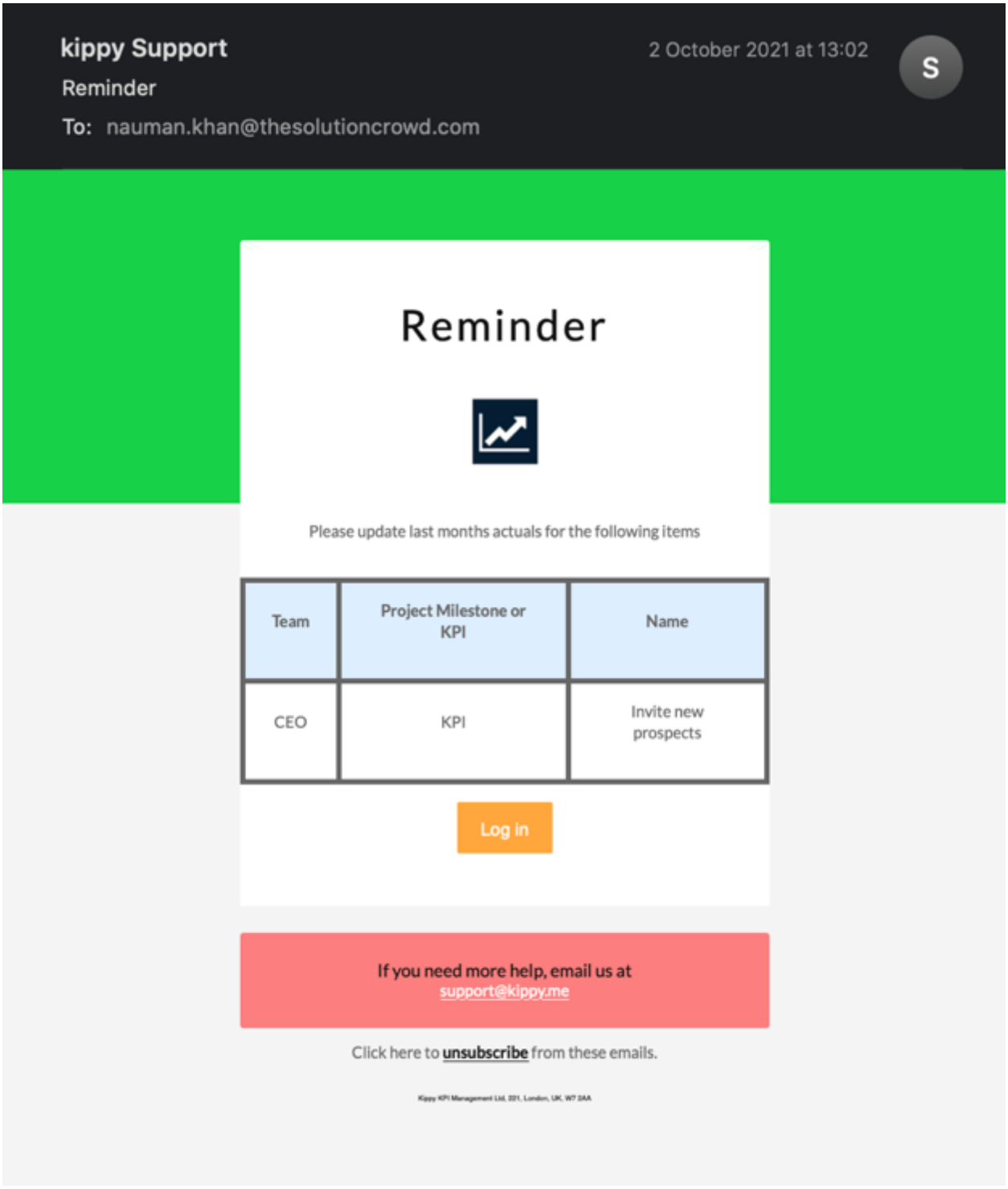
Reminders

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



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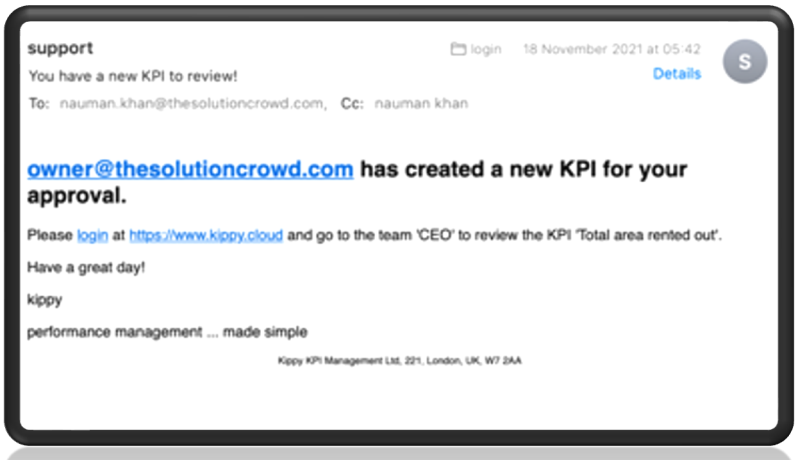
Notifications

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



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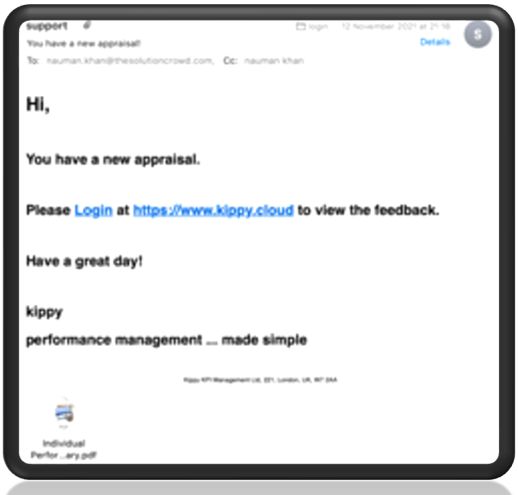

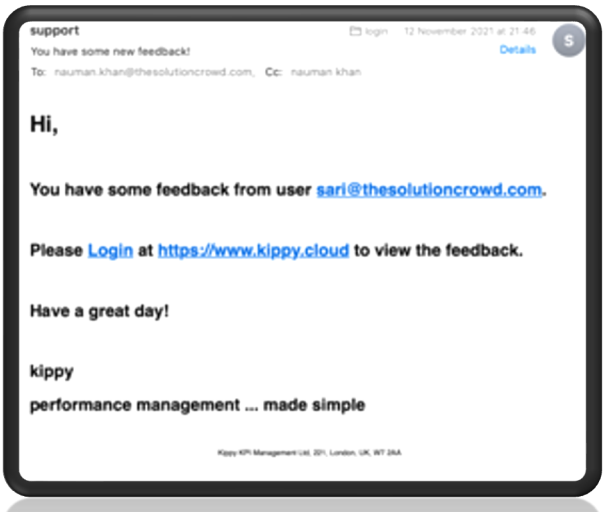

Each user can also set a “Silent mode” in their user profile, so they do not receive kippy notification emails.

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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!

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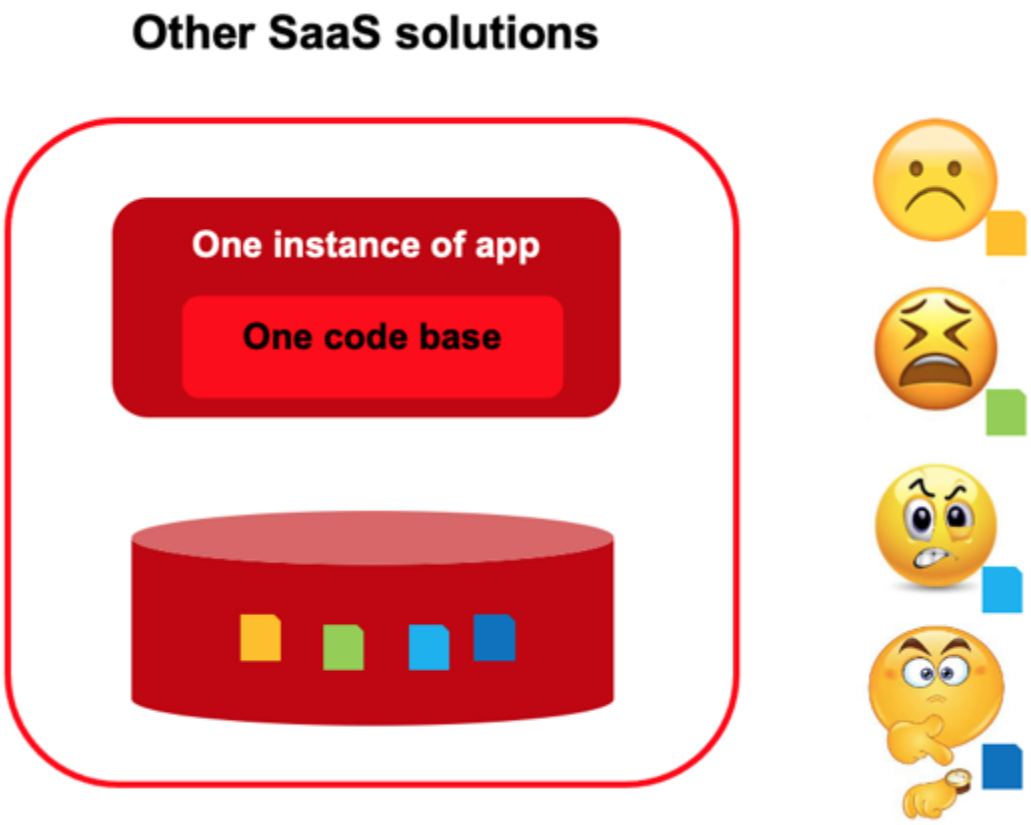

What does that mean for you? You have to put your requirements in a shared backlog for all your clients. You have to wait for the next major release. You have to do workarounds in your business processes to fit the constraints of their product.

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.

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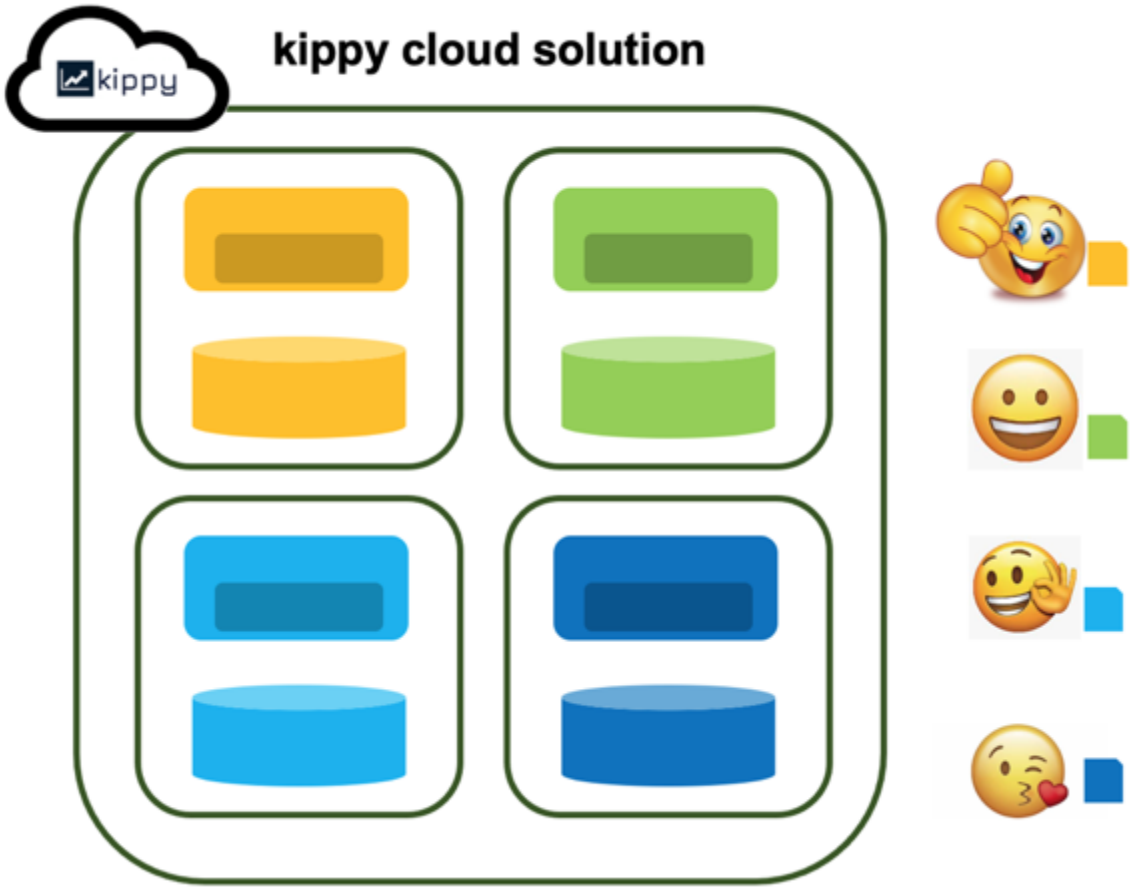

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Web APIs

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

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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!

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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!

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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.

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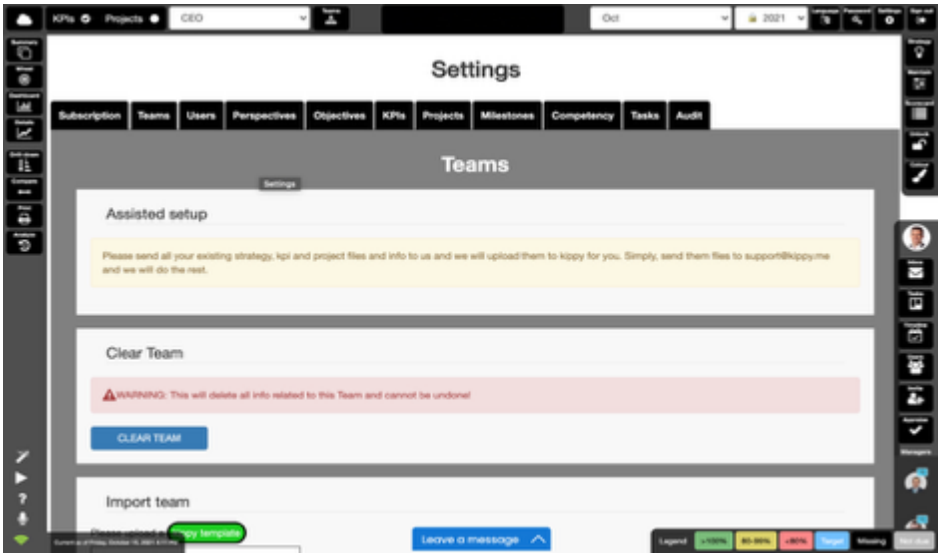
Fully configurable

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

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- 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.

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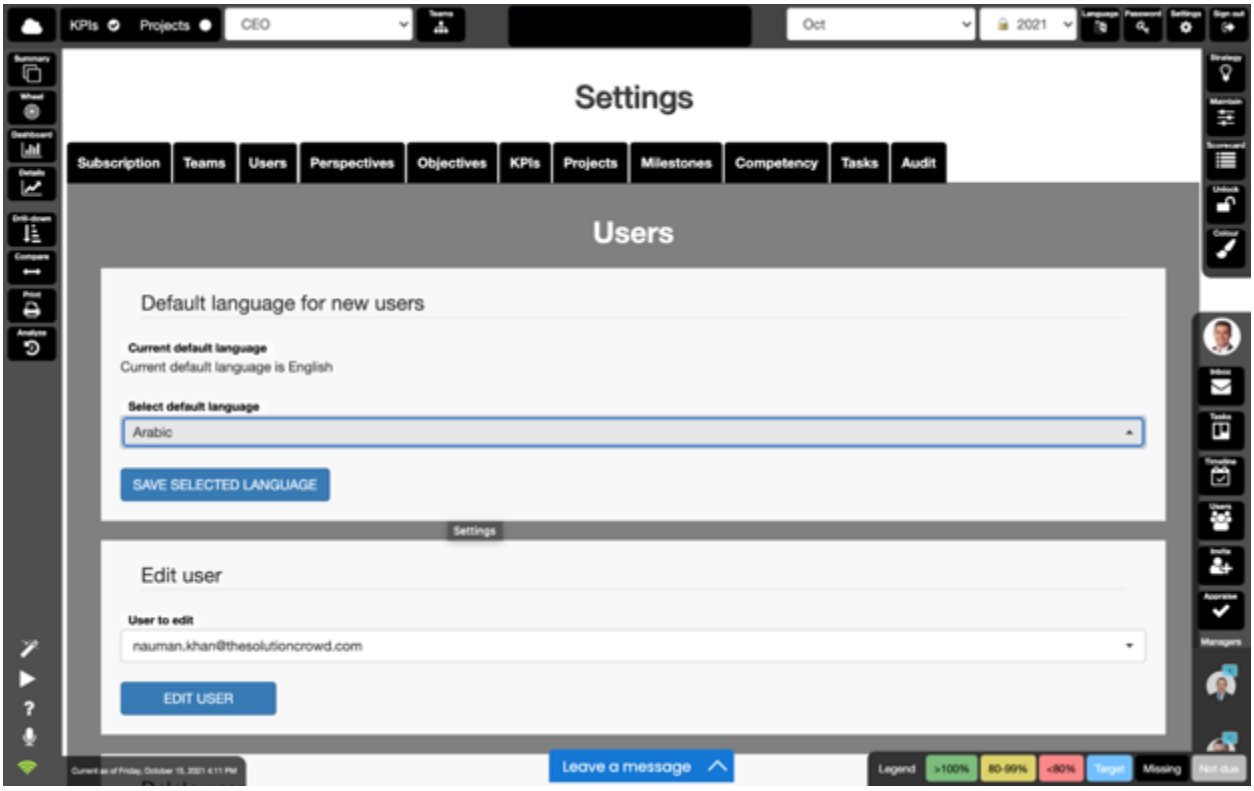
Multi-language

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.



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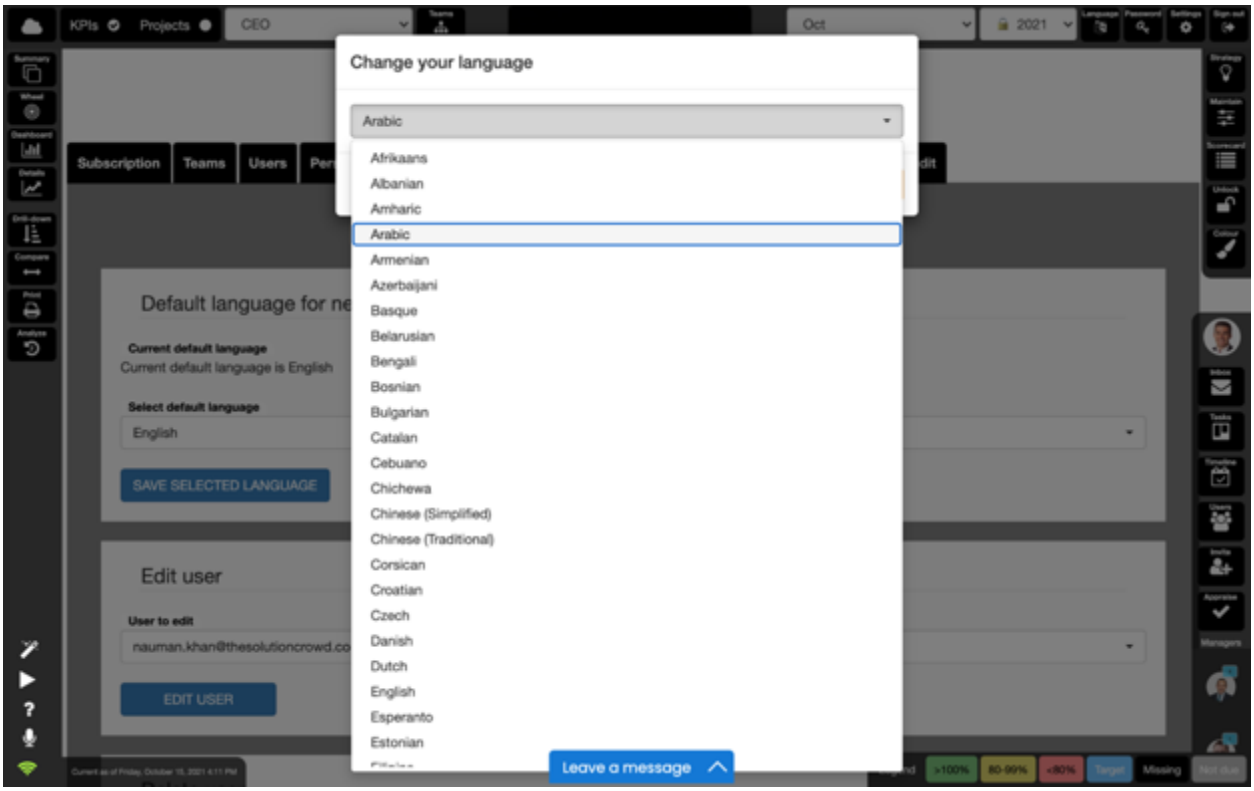

All screens and help have already been translated to Arabic and verified by a native Arabic speaker.

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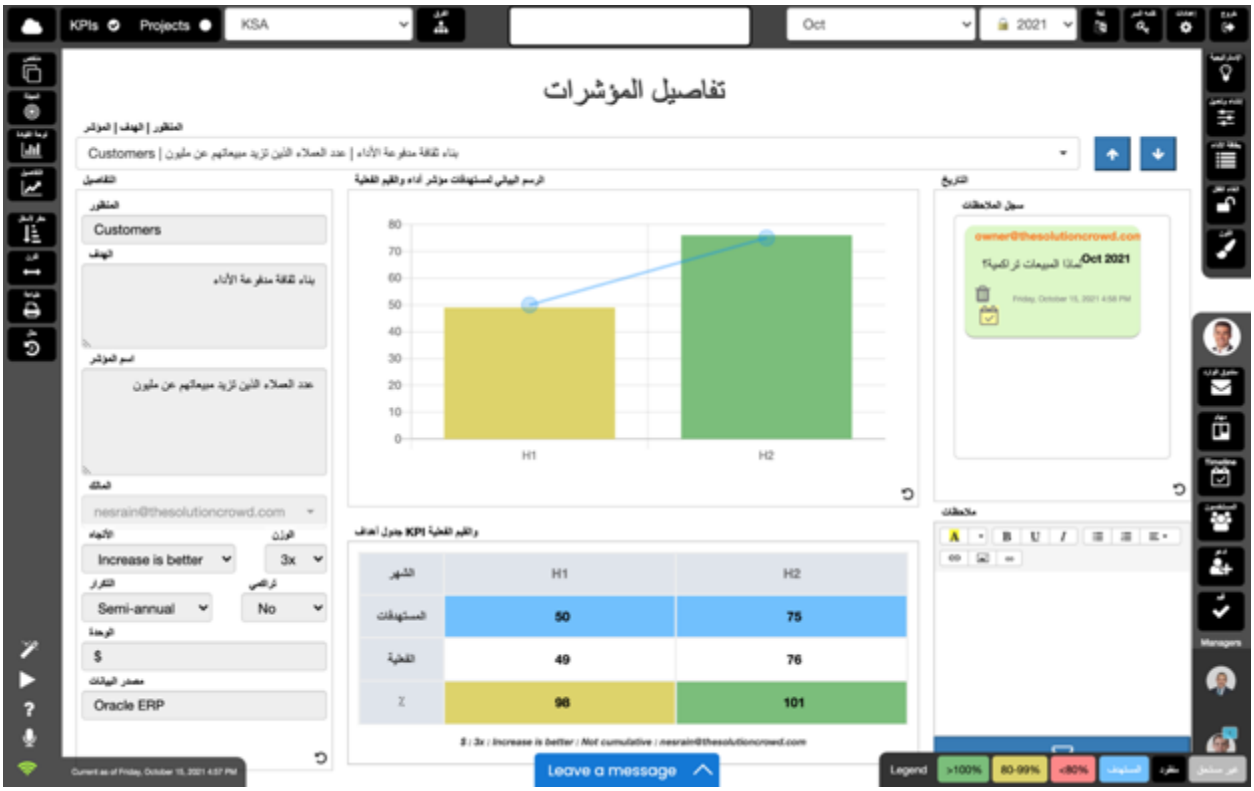

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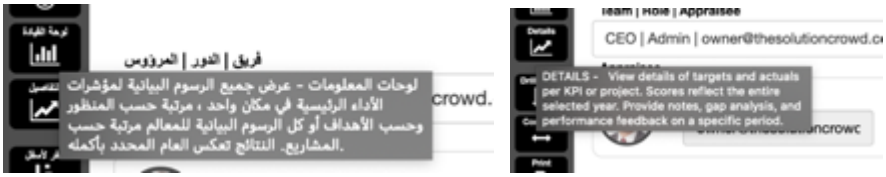
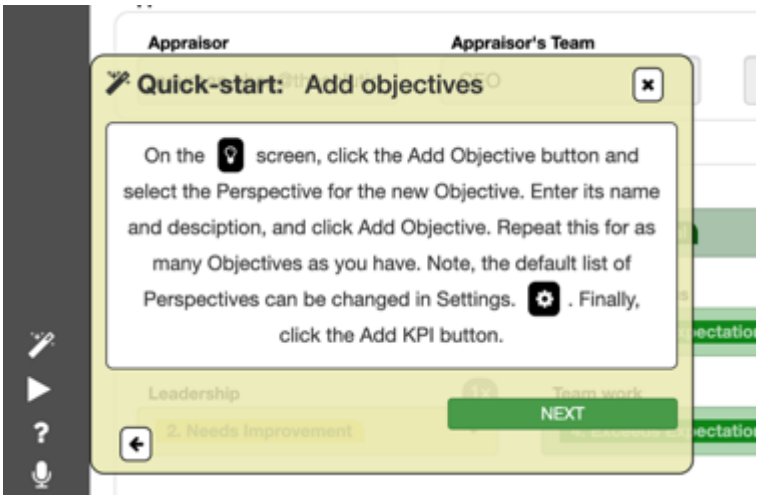
Help

All labels come with helpful help text on mouse hover.



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



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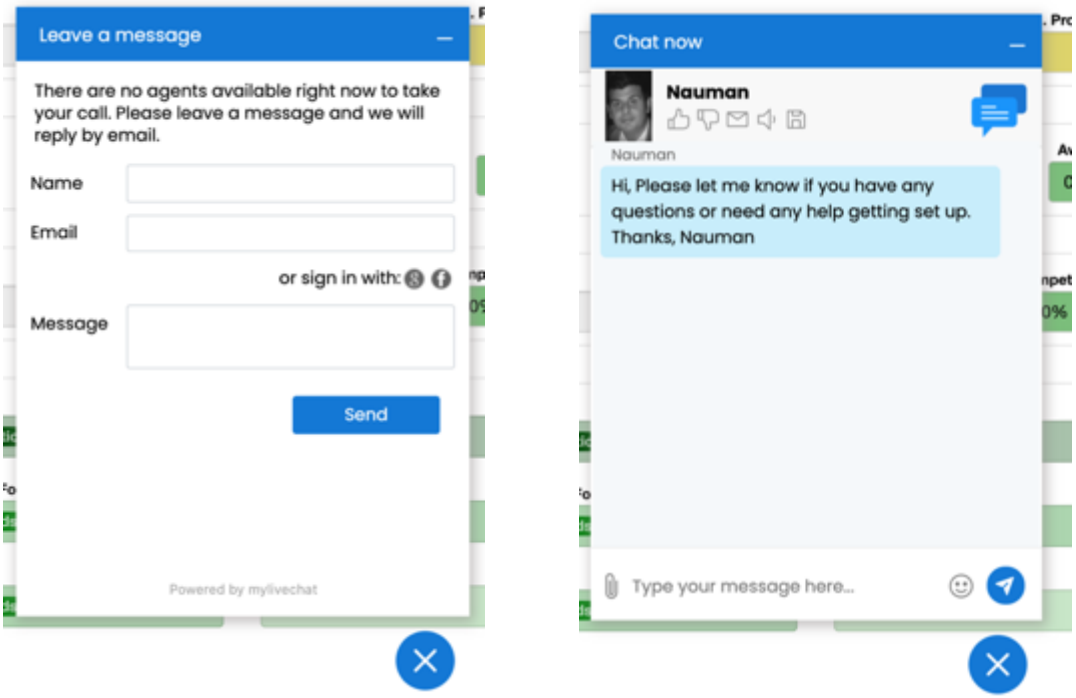

Free user manuals, how-to guides and help articles are also available via the Help buttons in the app and on the website www.kippy.cloud

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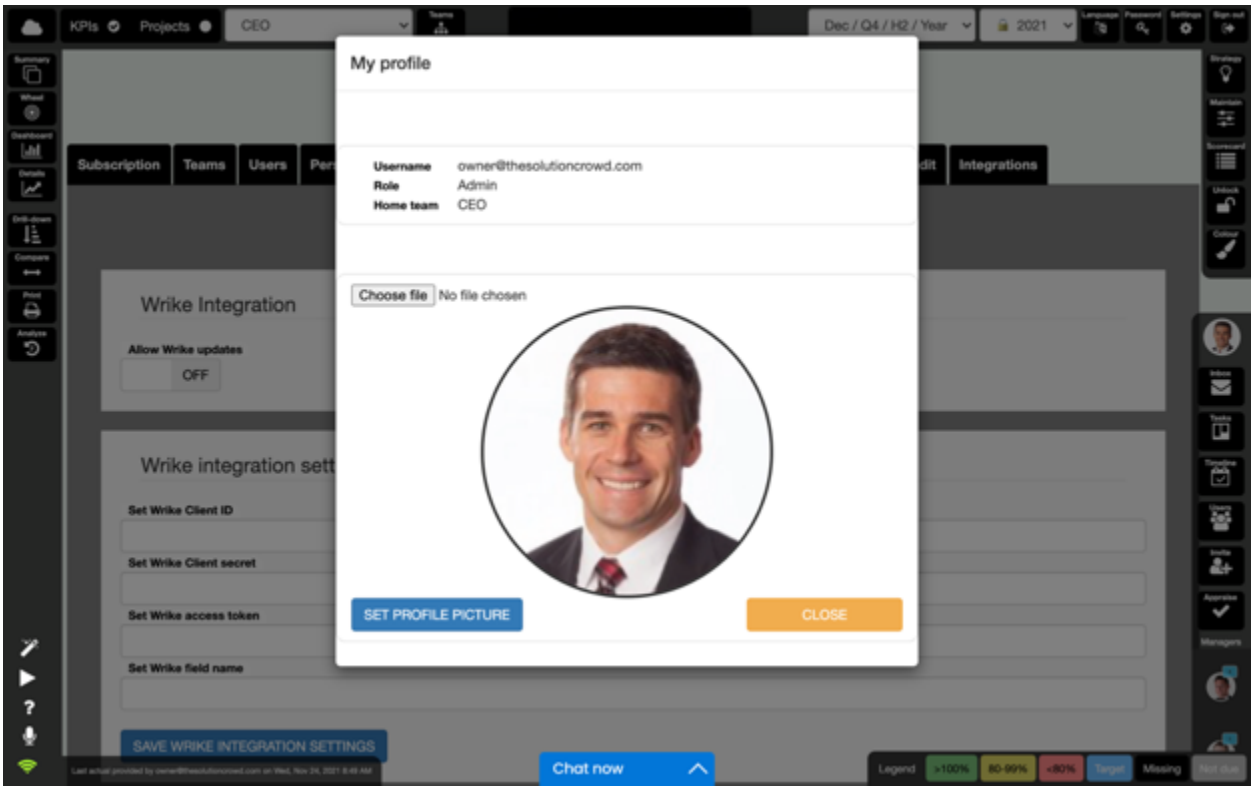
Personalisations

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

Set user profiles or let users self manage.



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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.

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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.

Download on the App Store

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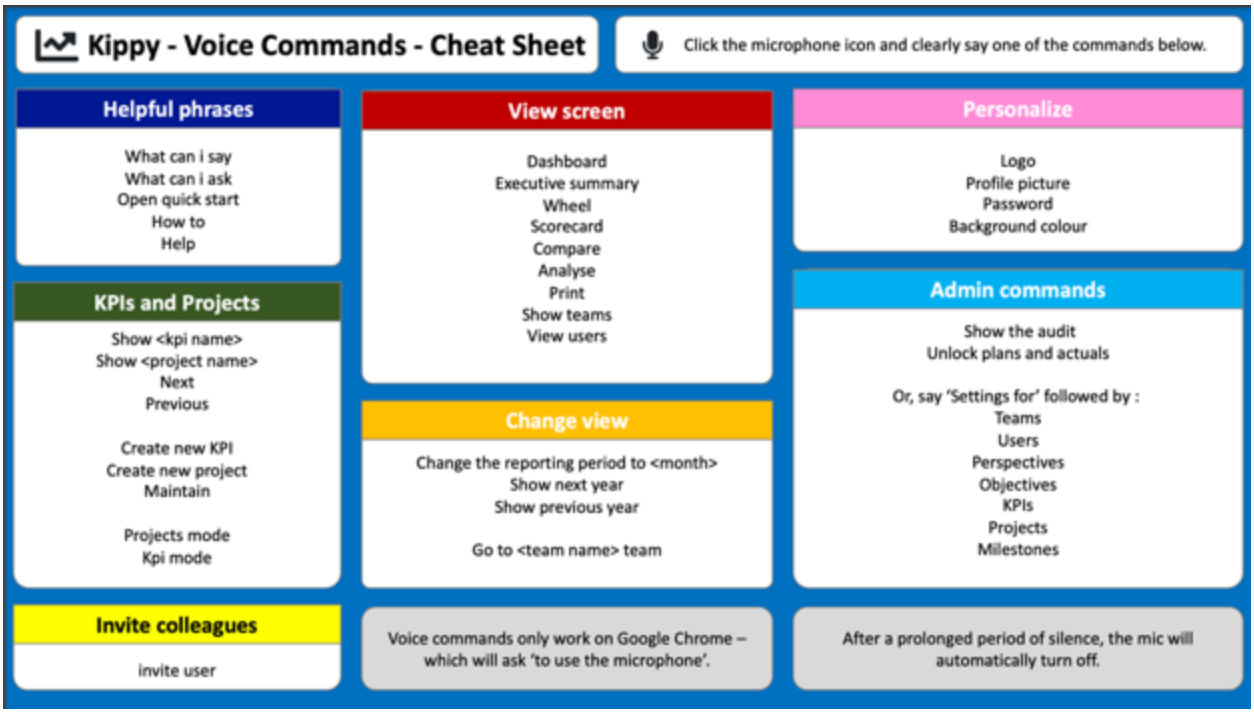
Navigation

Voice control

Change screens using your microphone.



Keyboard shortcuts

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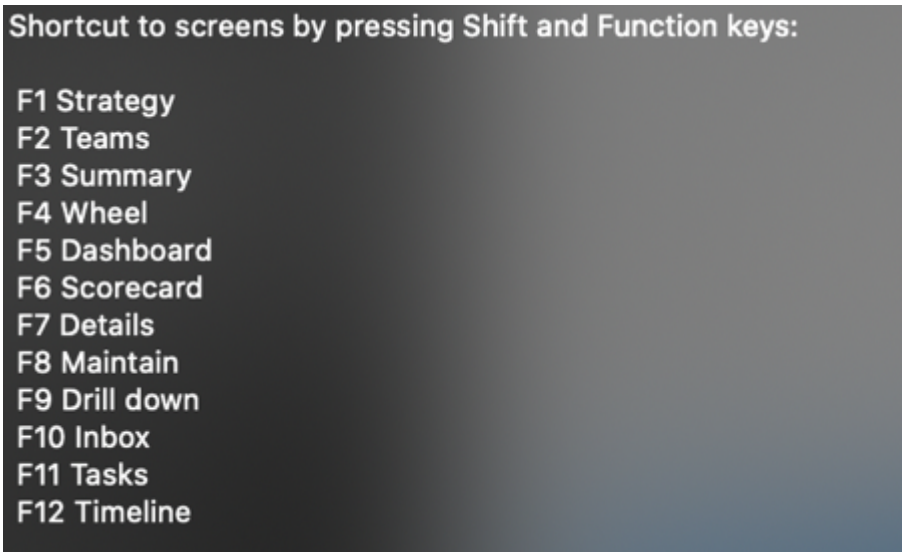

Tactile dashboards

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

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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

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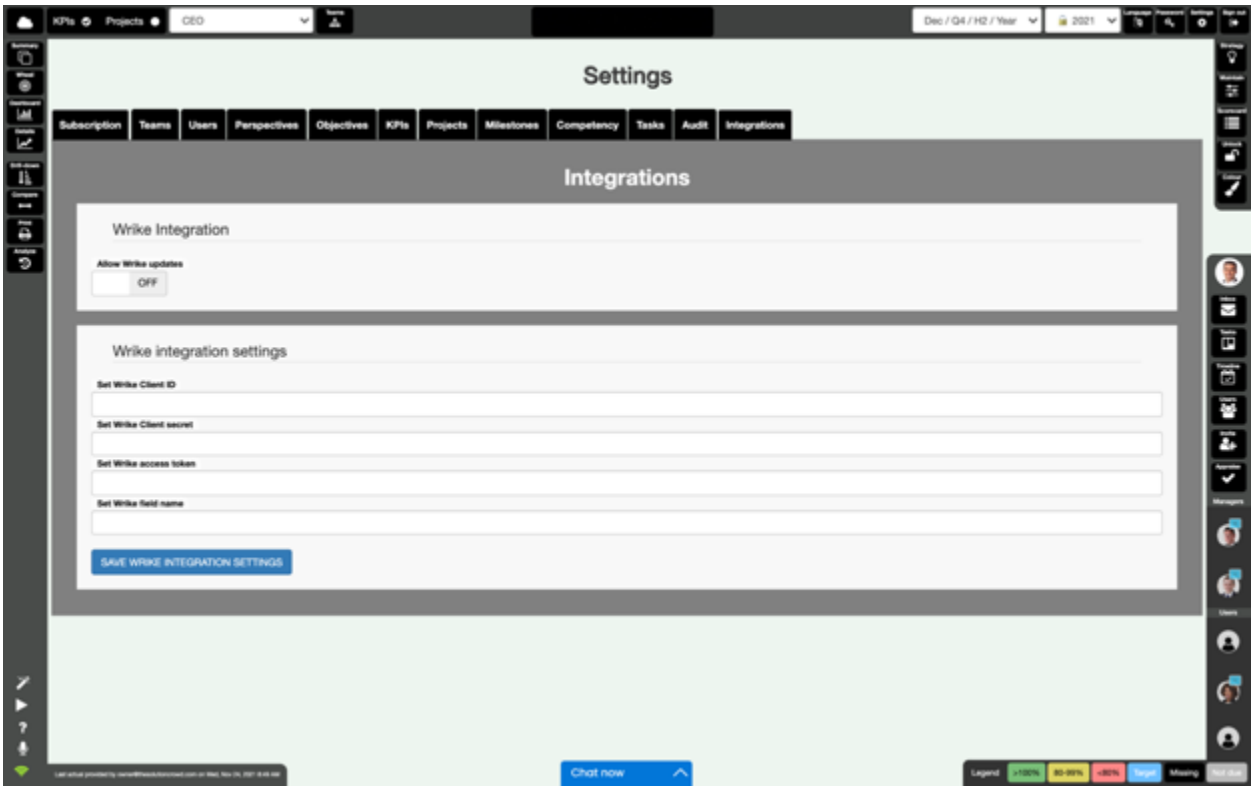
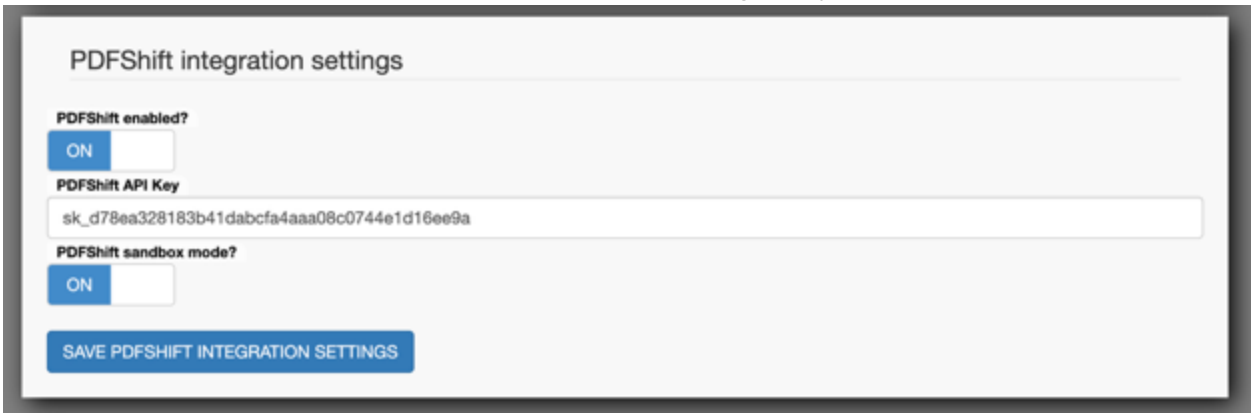
Built-in integrations

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.



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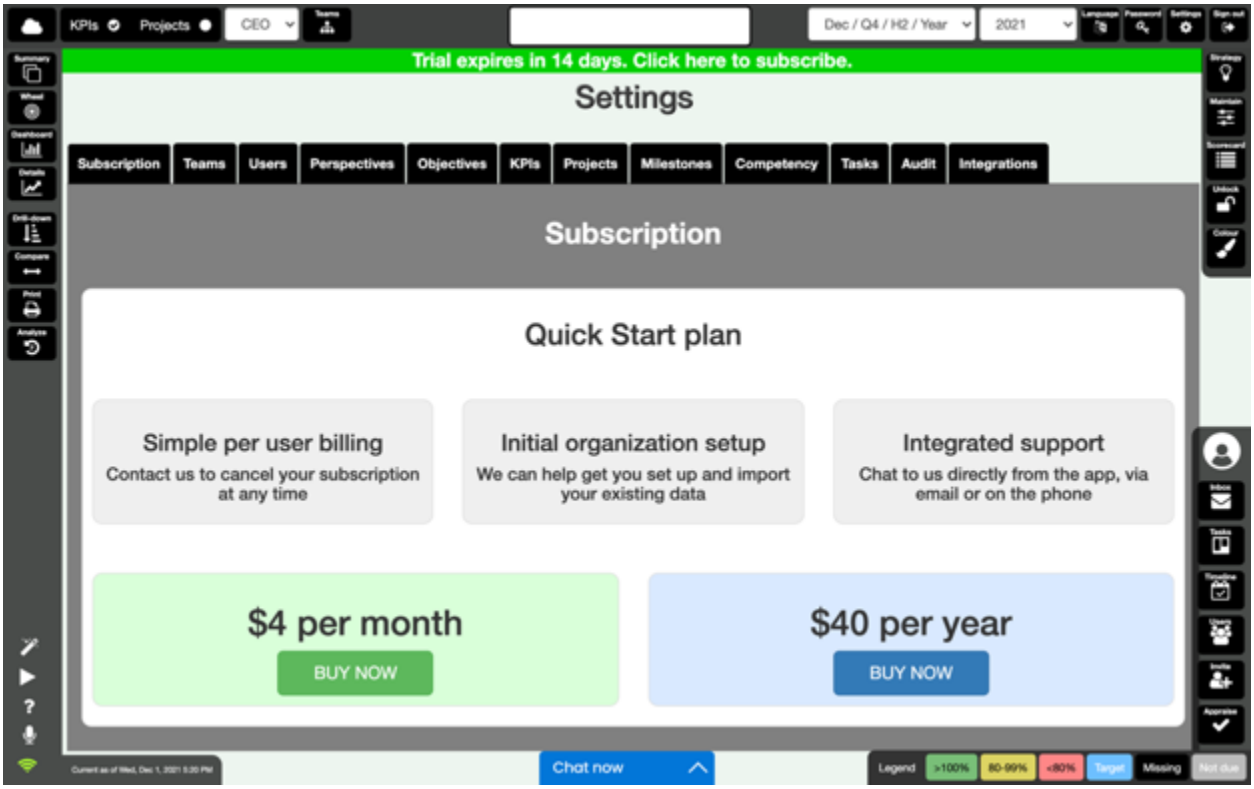
Billing

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



Invoice based billing available for bulk and enterprise usage.

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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

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- - 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 (IaaC) 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.

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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

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