

Minutes of Meeting

Date and Time	14 August 2025 09:00 PST	Meeting type	Zoom
Organiser	Mr. Rupesh	Client	Citywide

Attendees (Internal)

- Rupesh
- Kuldeep
- Jaspreet
- Sangita
- Vishesh
- Akash
- Ravinder
- Amit
- Gurpreet
- Kapil
- Ajay

Attendees (Client Side)

- Tom, Teresa, Matt

Agenda

- **Discussions on the following:**
 - Discussion on App Versions and TestFlight
 - QA Testing and Regression Testing
 - Ticket Review and Client Feedback
 - KPI Tracking in HR Configuration

The following things are discussed:

1. Discussion on App Versions and TestFlight

- a. Issue Raised by Teresa:** Teresa was unsure about how to check the correct app version on her device, as she had both the TestFlight and regular versions of the app installed.
 - i. **TestFlight App:** Displayed as *CHS*
 - ii. **Regular App:** Displayed as *CommandHub Solutions*
- b. Resolution:**
 - i. **Kuldeep** clarified that:
 - 1. The *CHS* app is the TestFlight version.
 - 2. The *CommandHub Solutions* app is the production version.
 - ii. **Teresa's Concern:** Teresa had difficulty logging into the *CommandHub Solutions* app with her admin account.
 - iii. **Next Step:**
 - 1. Kuldeep will provide step-by-step instructions on how to check which version of the app is installed.
 - 2. Teresa will contact her developer and work on resolving the login issue.

2. QA Testing and Regression Testing

- a. Current Status of Tasks:**
 - i. Kuldeep confirmed that most tasks have been completed and pushed for testing.
 - ii. Remaining tasks are under the QA team's review, and they will complete their testing by tomorrow.
- b. Clarification from Organizer:**
 - i. **Organizer** reminded that QA needs to perform **regression testing** on the staging environment to check for any potential issues or impact.
- c. Next Steps:**
 - i. The QA team will conduct the regression testing tomorrow.

3. Ticket Review and Client Feedback

- a. Teresa's Update:**
 - i. Teresa submitted new tickets based on recent feedback from clients.
 - ii. Kuldeep will check and address these tickets shortly.
- b. Action Item:**
 - i. Kuldeep will review the tickets and post comments if any further clarification or discussion is needed.

4. KPI Tracking in HR Configuration

- a. Discussion Initiated by Tom:**
 - i. **Tom** introduced the idea of adding **Key Performance Indicators (KPIs)** to the system for better tracking of performance across different departments.
 - ii. The system should allow for:
 - 1. **General KPI Settings** (e.g., setting rules like "Perfect Monthly Attendance = 10 points").
 - 2. **Department-Specific KPIs** where rules can be applied to individual or multiple departments.
 - 3. **Activity-Based KPIs** where activities (e.g., sales goals,

account acquisition) are linked to KPIs, and points are awarded for completion.

iii. Tom's Vision:

1. KPIs can be assigned to departments and tracked through software activities.
2. Salespeople's performance could be tracked based on number of accounts or revenue generated.
3. Example KPI for sales: "Get 3 clients a month" or "Bring in \$10,000 of income per month."

b. Next Steps:

- i. **KPI Integration:** The HR configuration will include a section for **KPI settings**, allowing admin users to configure rules, assign KPIs to departments, and track performance.
- c. **KPI Scope:** KPIs will apply to all departments (Sales, Finance, Customer Service, etc.). KPIs will be tied to activity codes (e.g., sales number, amount of revenue brought in) and performance tracking.
- d. **Example KPI for Activity Codes:** For guards, they are expected to report on either high-priority or low-priority tasks. Activity codes will be used to track these reports, and each task will be assigned specific points.
- e. **Assignment of Points:** Points will be assigned based on activity type and the department to which the activity belongs. For example:
 - i. **Standing Guard:** 1 point
 - ii. **Patrol:** 0.1 point for the same task (could be adjusted per department).
- f. **Mapping Activity Codes to KPIs**
 - i. **Linking Activity Codes to KPIs:** Activity codes (e.g., processing payroll, client visits) will have KPIs associated with them. These KPIs can be linked to specific departments with adjustable point values for each activity.
 - ii. **Tracking KPI with Departments:** Each department can have its own point system, and the system will need to track employee performance accordingly.
- g. **Setting KPIs in the System**
 - i. **Fixed KPIs:** The KPIs will be pre-defined and mapped in the system. Users cannot create their own KPIs on the fly; they will only be able to use predefined KPIs.
 - ii. **Tracking via Reports:** Employees will submit reports (e.g., payroll processing) that will automatically get tracked for KPIs based on the predefined activity codes.
- h. **Point Multipliers for Different Employee Shifts**
 - i. **Full-time vs. Part-time Employees:** KPI points will be adjusted based on the number of shifts worked:
 1. A **full-time employee** (21 shifts/month) will be expected to reach a certain KPI score (e.g., 100 points).
 2. **Part-time employees** will receive a pro-rated KPI score based on the number of shifts worked (e.g., if only 10 shifts are worked, the score is adjusted).
 - ii. **Calculation:** The multiplier formula will be based on the total number of shifts worked divided by the standard 21 shifts (e.g.,

21/10 for part-time employees).

i. Dashboard Widget & Negative Points

- i. **Dashboard Widget:** The system will need a widget for KPI tracking on the dashboard. This will allow easy tracking of individual and departmental performance.
- ii. **Negative Points:** There is concern about the impact of negative points on employees. It was discussed whether employees with negative points should face automatic termination or corrective action.
 - 1. **Next Steps:** A benchmark system needs to be set up where corrective actions are triggered based on negative points (e.g., multiple complaints or underperformance).
 - 2. **System Alerts:** The system will need to send notifications or flags when an employee reaches a threshold for corrective action.

j. Miscellaneous

- i. **Category of Remarks:** The system should allow different remark categories (positive, negative, general) to be associated with KPIs, and each remark can have a different point value.
 - 1. Example: A complaint remark might be assigned negative points, while a positive remark could earn points.
- ii. **Employee Profiles:** All KPI data will be linked to employee profiles, including both positive and negative feedback. Weekly, monthly, and quarterly KPIs will be tracked and displayed on the employee's profile.

k. Missed Assignments and Consequences:

- i. **Tom** mentioned the importance of tracking missed assignments and imposing a points deduction.
- ii. **Concerns** were raised about situations where employees complete assignments but do not report them. A rule will be needed to handle such scenarios.
- iii. Consequences for missing assignments or failing to complete them need to be defined clearly, as the employee's actions affect their KPI and scores.

l. Training and KPIs:

- i. **Organizer** raised a question about correlating KPIs with training completion. The need for tracking course completion time and passing score was discussed.
- ii. **Tom** suggested setting up KPIs for how many courses are assigned, passed, or failed by employees, though students would not see the individual details.

m. Performance Consequences (Scores and Warnings):

- i. **Tom** outlined a proposed rule for scoring:
 - 1. 80-100 = Passing
 - 2. 70-79 = First month: Verbal warning, Second month: Write-up, Third month: Suspension, Fourth month: Termination
 - 3. 60-69 = First month: Write-up, Second month: Suspension, Third month: Termination

- ii. **Rupesh** clarified that the scores and consequences would not have to be consecutive. For example, if an employee improves after a warning and then falls again, the termination might still occur due to repeated performance issues.
- n. **Employee Performance and Accountability:**
 - i. **Teresa** explained that the rules would be based on performance across months, without the need for consecutive violations. If an employee improves but then falters again (e.g., scoring 60), they would be at risk for termination due to the recurring nature of the performance issue.
 - ii. **Tom** emphasized that the violations affecting KPIs (e.g., missed assignments or attendance) could escalate to termination depending on the severity and timing of the actions.
- o. **General vs. Client-Specific KPIs:**
 - i. The KPIs being discussed would be **generic** and **not client-specific**. **Tom** stressed that the system should be flexible enough for clients to adjust point values according to their needs, but the general KPIs like attendance, performance, and training completion should be the same across the board.
 - ii. **Rupesh** emphasized the importance of keeping KPIs standardized while offering flexibility for different clients' specific requirements. Custom KPIs would be an added cost for clients.
- p. **Integration into the Employee Profile:**
 - i. **Kuldeep** raised concerns about integrating KPIs into the **Employee Profile** system and the complexities involved in tracking and updating points.
 - ii. **Tom** agreed that employees should have access to their profiles and track their progress. **Teresa** confirmed that KPIs would be part of the employee's profile, with data visible both to the employee and to management.
 - iii. Analytics and reporting will also need to reflect these KPIs, and **Tom** requested that this information be easy to access for both employees and management.
- q. **Complexity of the System:**
 - i. **Kuldeep** expressed that the system might be complex, especially the points mapping and scoring logic, as there are many variables and dependencies.
 - ii. **Tom** inquired about the level of complexity compared to past projects. **Kuldeep** rated it an 8-9 in terms of complexity, acknowledging the challenge in understanding the vision clearly and ensuring the system works for a variety of clients.
- r. **System Flexibility and Adjustments**
 - i. **Matthew Gardner** asked if the point system would be adjustable. **Tom** confirmed that the point system would be adjustable but would have default settings, and clients could modify them as needed.
 - ii. **Kuldeep** inquired if the settings would be stored in the company system or uploaded as reference documents. **Teresa** clarified that the settings would be stored in the system, specifically in the **ERM** and **Employee Profile**, and would be visible to employees.

s. Final Thoughts and Next Steps:

- i. **Rupesh** stated that the team would sit down and review the details to clarify the approach for both generic and client-specific needs.
- ii. **Kuldeep** mentioned that there were still challenges in implementing the system, especially with ensuring accurate mapping, scoring, and profile integration.
- iii. **Tom** expressed his confidence that the team would work through these complexities.