KRO PM – **AS ONE** OBJECT MODEL

July 5, 2018

Strength Assessment Value
- Strength Assessment
- Value
- Value Type
- Value Score
- Order

Values
- Company
- Value
- Value Type
- Value Title
- Value Statement
- Order

1 – Financial
2 – Team
3 – Brand

Strength Assessment
- Assessment Request
- Assessed by Person
- Assessment Date
- Assessment Start Time
- Assessment End Time
- Location
- Development Skill
- Development Knowledge
- Development Passion
- Development Wisdom
- Employee Additional Comments

Strength Assessment Request
- Person Assessed
- Request Date
- Review Period From
- Review Period To
- Randomize?

Assessment Request Persons
- Strength Assessment Request
- Assessed by Person
- Completed?

Strength Assessment Review
- Assessment Request
- Assessed by Person
- Review Date
- Reviewers Comments
- Employee Comments

Assessment Answer
- Scorecard Question
- Answer value
- Person
- Company
- Date / Time

Assessment Question
- Question
- Scorecard Section
- Order
- Hidden?
- Description
- Lowest value label
- Highest value label

Assessment Section
- Section Title
- Scorecard Type
- Order
- Hidden?
- Description

Assessment Request
- Person
- Scorecard
- Request Date / Time
- Completed?

Assessment Type
- Scorecard title
- Scorecard Type
- Lowest answer value
- Highest answer value
- Incremental value labels

1 – Financial
2 – Team
3 – Brand

Scorecard Type
- Scorecard Name
- ForOwner?
- ForManager?
- ForEmployee?
- ForDepartment?
- Department (if ForDepartment)

Owner
Executive
Revenue
Ops
Admin
Marketing
HR
Quality
KPI

Company Scorecard Value
- Company
- Scorecard Item
- Year
- Item Value
- Date Entered
- Entered by
- Verified by

Scorecard Item
- Item Name
- Scorecard Type
- Scorecard Section
- Section Row
- Section Column
- Value Type
- Popup Help

Scorecard Section
- Section Name
- Icon File
- Order

Percentage
Number
Decimal
Currency
Fraction
Text

Business Analytics
Team Analytics
Employee Analytics

Notification
- Person
- Notification Template
- Acknowledge Date / Time
- Remind Later?

Notification Template
- Notification Type
- Subject or Title
- Message
- Delivery Method

1 – Welcome Message
2 – KPI Data Due
3 – Action Item Deadline Soon
4 – Action Item Deadline Coming

1 – Email Message
2 – In-App Overlay Message
3 – Text Message (future)
4 – Push Notification (future)

Performance Review
- Person Reviewed
- Reviewed by
- Date of Appraisal
- Location
- Review Period From
- Review Period To
- Overall Performance
- Strengths
- Areas for Further Development
- Challenges
- Employee's Comments

Person
- First Name
- Last Name
- Email
- Phone
- Company
- IsOwner?
- IsManager?
- IsEmployee?
- Is3rdParty?
- Job Description
- Join Date
- Position Date
- Employee #
- Username
- Password

Team
- Date Created
- Active?

Team Member
- Team
- Member Type
- Person
- Role
- Company Department
- External Vendor (if type=3)
- Date Joined
- Active?

1 – Person
2 – Department
3 – External

Employee Development Plan Review
- Person Reviewed
- Reviewed by
- Assessment Date
- Location
- Review Period From
- Review Period To
- Job Specific Dev Needs
- Future Opportunities

Job Qualification
- Job Description
- Class
- Qualification

Level 1
Level 2
Level 3

Success
- Title
- Company
- Success Description
- Meeting
- Date / Time
- Growth Class
- Benefit Summary
- Team
- Financial Success?
- Team Success?
- Brand Success?
- Individual Success?

KRO
- Performance Review =Process
- Leadership – Cycle
- High Performance vs. Peak Performance
- Role of President
Government
- Tax
- Regulation change

KRO-PM Resource
- KRO-PM Resource Category
- Title
- Resource File
- Version
- Date / Time

KRO-PM Resource Category
- Category
- Parent Category
- Title
- Description
- ForOwner
- ForManager
- ForEmployee

Shareholder information
- Shareholder structure
- Shareholder agreement
- President / employment contract
Shareholder page
- Will
- Insurance
- Bank info
- Hold Co
- Trust
Business Information
- Articles of incorporation
- Bank covenants
- Bank loans
- Leases agreements
- Contracts
- Escrow
- Insurance
Business Operation
- Performance review
- Employee review
- Business plan
- Strategic plan
- Project
- Action Items
- Business structure / job description
- Compensation structure
- Benefits provider
- JH&SC
- WSIB
- Success formula
- Survey results

Employee Development Plan Action Step
- Person
- Action Step Description
- Growth Class
- Measure of Success
- Source Employee Dev Review
- Source Strength Assessment
- Source Performance Review
- Team

Challenge
- Title
- Company
- Problem
- Meeting
- Date / Time
- Originator
- Group Input
- Team
- Growth Class
- Financial Benefit?
- Team Benefit?
- Brand Benefit?
- Individual Benefit?

Message
- Company
- Company Department
- Person
- IsAllUsers
- Message
- ExpireDate

Company Resource
- Company
- Company Resource Category
- Title
- Resource File
- Version
- Date / Time

Company Resource Category
- Category
- Parent Category
- Title
- Description
- ForOwner
- ForManager
- ForEmployee

Job Description
- Job Title
- Company Department
- Job Category
- Summary of position
- Report to
- Administration
- Nature and Scope
- Approved by
- Prepared by

Job Category
- Job Category Name
- Order

Administration
Sales
Production
Service

Company
- Name
- Address
- City
- Postal Code
- Province
- Country
- Client Date
- Company Category
- Logo File
- Year-End (mm-dd)

Company Department
- Company
- Department Name
- Department

Department
- Department Name
- Order

Marketing
Product Development
Manufacturing
Quality Assurance
Shipping

Financial Statement Type
- Company
- Statement Name
- Had Budgeted Amounts?
- Order

Statement Section
- Company FS Type
- Section
- Order

Assets
Liabilities
Equity

Project
- Title
- Meeting (if applicable)
- Company
- Team
- Growth Class
- Problem
- Opportunity or Gains
- Estimated Budget
- Goals
- Budget Approved?
- Budget Department
- Stall Alert?

Growth Class
- Milestone Type Title
- Order

Communication
Process
Competency

Company Category
- Company Category Name
- Order

Province/State
- Province/State Name
- Country

Country
- Country Name

Information Technology
Manufacturing
Service
Retail

Statement Category
- Statement Section
- Category Name
- Order

Current
Capital Assets
Deferred Charges
Investment
Other

Project/Milestone/ Development Step Status
- Project
- Milestone
- Meeting (if applicable)
- Status
- Date
- Percent Complete
- Comments
- New Budget
- New Due Date
- Growth Class
- Development Plan Step

Status
- Status Title
- Order

New
Active
On Hold
Closed

Meeting Financial Statement
- Meeting Type
- Financial Statement Type
- Order

Statement Line Item
- Statement Category
- Company Department
- Line Item
- Order

Cash
Account Receivable
Income Tax (Recovered)
Inventory - Net of provision
Prepaid Expense
A/R Recoverable
Other

Event Calendar
- Event title
- Event type
- Meeting (if event type=1)
- Project (if event type=2)
- Milestone (if event type=3)
- Description
- Date / time
- Location

1 – Meeting
2 – Project deliverable
3 – Actionable deliverable
4 – Other

Financial Statement Value
- Month
- Year
- Statement Line Item
- Budgeted Amount
- Budgeted Entered by
- Approved?
- Actual Amount
- Actual Entered by
- Actual Verified by
- Order

Activity History
- Object
- Object ID
- Action
- User
- User ID
- Date Time
- Previous Value
- New Value

1 – Create
2 – Modify
3 – Delete

System Settings
- Setting
- Value

Default notification = 3
Login fails = 3
Parking Lot time = 5 minutes

Milestone
- Title
- Project
- Meeting (if applicable)
- Company (if not from a meeting)
- Problem
- Growth Class
- Team
- Opportunity or Gains
- Estimated Budget
- Budget Approved?
- Budget Department
- Stall Alert?

Meeting
- Meeting Type
- Company
- Date & time
- Location
- Start Date & time
- End Date & time

Meeting Attendance
- Meeting
- Person
- Present or Absent
- Role

1 – Owners
2 – Managers
3 – Employees
4 – Department
5 – 3rd Party

1 – Attendee
2 – Facilitator
3 – Chair

Workshop / Exercise

Define Brand Values

Define/Update Team Values

Meeting Type
- Meeting Title
- Attendee Type
- Department (optional)
- Description

Attendee Type
- Attendee Title
- Is Department?

Meeting Progress Notes
- Meeting
- Project
- Milestone
- Meeting Topic
- Meeting Parking Lot
- Presenter
- Meeting Notes
- Post Meeting Notes
- Start Date & time
- End Date & time

If Meeting Topic = -1 then it's the Other section, added by default.

Meeting Section
- Meeting Type
- Company
- Section Title
- Department (optional)
- Estimated Duration
- Order

Banking Review (Bookkeeping)
Accounting Review (Bookkeeping)
Payroll Review (Bookkeeping)
Parking Lot (Manager)

Compensation

Base Pay

Variable Pay

Recognition

Meeting Topic
- Meeting Section
- Topic Title
- Review Financials?
- Review Success/Challenge?
- Review Project/Actionitem?
- Order

Bookkeeping progress report – AP / AR
Budget vs Actual report
Bookkeeping – Success / Challenges / Opportunities

Meeting Parking Lot
- Meeting
- Meeting Section
- Meeting Topic
- Originator
- Notes
- Time Alloted