User Stories

Pain Areas

1. What employees are doing is not aligned completely with organization's objectives
2. Criteria on which employees are evaluated is not aligned with organization's objectives
3. What employees are doing is not aligned with what they will be evaluated upon
4. Too many vague goals which leave room for managerial discretion and also make reviews a difficult exercise
5. Tendency to fill time by doing useless tasks, letting work expand to fill time available.
6. Managers misinformed about their team's workload
7. Not planning day properly, leading to uncoordinated way of working where you are suddenly dropped into a situation where you have little time to respond or have to wait a long time before getting response
8. Too many review meetings, some of which could be avoided if employees were providing reliable and timely updates through the system.
9. Dashboards being cleverly manipulated by reportees to show what they want or to de-emphasize the problems.

1) Users can be categorized as infrequent but senior users (CXOs / department heads) or frequent but junior level users. Senior level users will use reports and dashboards more frequently, while junior level users will be more concerned with UI/UX, features and flexibility.

2) Goals are defined at organizational level and cascaded down. End dates of master goal define the outer limit of end dates for cascaded goals. User is free to advance the end date, but not extend it. Similarly, sales targets may be increased as they cascade down, but not reduced. This means we need to categorize the targets as being upward prohibited (e.g. end dates) or downward prohibited (e.g. sales targets)

3) Goals are defined annually. All subsequent revisions(additions/deletions/updates) are logged as changes. Totally redundant goals may be aborted, but can never be deleted.

4) A goal can have multiple departments/users as responsible. However at task level multiple assigning should be avoided, even though the system will allow it

5) Every goal will have a Unique Identifier, which extends as it is cascaded down. Example goals 2.3.2 and 2.3.1.3 are both cascades of parent goal 2, and also its sub goal 3, but diverge subsequently.

6) A goal can be edited/updated/aborted only by the assignor. Changes cascade down to users. Users receive notification of change in goals and can view the changes by clicking on the notification. Date changes reflect in the calendar

7) Bare minimum information in a goal:
   - Title
   - Short description
   - Start date
   - End date
   - Person(s) responsible
   - Request update frequency (daily/weekly/fortnightly/monthly/every particular weekday). These get populated in assignee's calendar

8) Goals will divided into 2 categories:
   Primary Goals - Cascaded from levels above
   Secondary Goals - Any goal that is not a primary goal

9) Goal can be created in 2 ways:
   1. Assigned by manager *(check: all primary goals must be assigned by manager only. However, all goals assigned by manager need not be primary)*
   2. Assigned by self *(check: all goals assigned by self are secondary goals only. However, all secondary goals need not be self assigned. They could be assigned by manager or co workers)*

10) Upon being assigned a goal, an assignee has the option to suggest modifications. The modifications will be sent as an alert to the assignor who may accept or reject the changes or further modify them. Once accepted, the goal becomes part of the tracker. It is recommended that discussions about modifying the goal be carried out offline instead of excessive back and forth on the application

11) User can request modification of an accepted goal through the system. This will generate an alert to the assignor who can accept, modify or reject the request.

12) Goals can be marked as complete by the assignee and submitted for review. This will generate an alert to the assignor who can accept, modify or reject the closure. In case of modification or rejection, the goal reopens in the assignee's dashboard

13) Assignee can see acceptance status of goals in the dashboard

14) Assignor can see acceptance status of goals in the dashboar

15) Goals can include projects and projects can include tasks. Projects can be assigned independent of goals (as secondary projects) and tasks can be assigned

independent of projects (as secondary tasks)

16) Task. All three trackables - goals, projects and tasks are assignable and carry same level of details. All trackables inherit their restrictions from parents. It is not necessary that every goal be broken down into project or every project be broken down into tasks. It is left to individual discretion

17) All trackables will have an option to request support from another user (let's call this person 'Helper'). A helper may decline help, assigning a reason or accept the request. On accepting, it becomes part of their tracker. Requesting for help is different from 'shared responsibilities', which are automatically assigned to multiple users.

18) Users can open a chat / discussion on any trackable and tag/untag users into it. Chats can be deleted only by the user who created it. Edits to chats are not permitted. However, users can delete the chats on their device. Attachments can be added to chats.

19) Users can ask for approvals related to specific trackable.

20) Meetings can be set up and populated into the calendar. Meetings must flow from a trackable.

21) Minutes of meeting forms - Forms with pre-defined fields can be opened to serve as MoMs. These can be populated during a call or after it and can be circulated. All MoMs, unless informational must convert into trackables and get assigned.

22) Managers can see everything that their subordinates are doing but not vice versa.

23) Managers should get an alert while assigning trackables if the assignee's calendar is full or approaching full. However the manager can still assign the trackable.

24) Manager can assign priorities to subordinates' trackables and also change priorities midway.

25) Trackables' status accumulate into parent trackables' status.

26) User can control how much information they wish to receive through 'modes'. Action mode means all notifications are visible, while Priority means only priority items are visible. Snooze mode may be used if the employee is on leave but is open to responding to critical matters.

27) Similarly dashboards can also be customized based on modes

28) Notifications can be toggled on/off at trackable level. By default all notifications are turned on.

29) User should have following handy information available at home page:
1. Ability to see action items for the day / week / month / specific calendar period
2. Ability to see meetings for the day / week / month / specific calendar period
3. The day's work plan, with priorities color coded.
4. A visual representation of overdue / 'nearing deadline' items
5. A health meter for each subordinate showing how she/he is progressing with respect to their goals.
6. Their own health meter

Guiding Principal - Convergence | Traceability | Visibility:

a) Information acquired by the system must converge to provide a meaningful and visual feedback the user or their team and managers
b) Traceability of tasks to organizational goals is very important.

c) Users should have a very good visual image of how they are doing with respect to their goals.

Personas (use while testing)

CEO
1. Increase sales by Rs 20 Cr (sales)
2. Increase EBT by Rs 4 Cr (all departments)
3. Complete acquisition of one competitor (BD, finance, legal)
4. Become among top 20 employers of choice (HR)
5. Reduce contractual risks with suppliers (Supply Chain, legal)
6. Reduce contractual risks with customers (Sales, legal)
7. Improve customer satisfaction index by XX (Customer support, Operations)

CFO
1. Bring down borrowing cost (P)
2. Achieve financial closure for acquisition (P)
3. Complete FY audit one month earlier than usual (S)

Legal
1. Review all supplier and customer contracts (P)
2. Complete paper work for acquisition (P)
3. Create a company wide compliance calendar (S)
4. Reduce dependence on external counsel (P)

Sales
1. Increase sales by minimum Rs 20 Cr (P)
2. Reduce contractual risk with customers (S)
3. Set up sales office in South East Asia (S)
4. Increase share of high margin accounts (P)

Customer Support
1. Improve CSI by XX points (P)
2. Customer connect meets every quarter (S)
3. Automate customer support process to reduce headcount (P)

Operations / Engineering
1. Improve CSI by XX points (P)
2. Reduce turn around time from 2 days to 1 day (S)
3. Reduce rework and recalls (P)

Business Development
1. Complete negotiations for acquisition of competitor (P)
2. Win dealership of at least one new OEM (S)

Human Resources
1. Become among top 20 employers of choice (P)
2. Reduce attrition by 500 basis points (S)
3. Implement HRMS (S)