MANAGEMENT BY OBJECTIVE (MBO)PROCESS WORKFLOW DOCUMENT

Table of Contents

1:-<u>What is MBO</u>

- <u>It is a Performance Evaluation & Appraisal System for all Employees</u>

2:- <u>Features of MBO</u>

- <u>MBO is used to improve, previously used, paper based employee appraisal system.</u>
- <u>This will streamline the overall process & will also provide greater visibility for execution of appraisal & evaluation. It also includes :</u>
  - Simplified Targets & Goals
  - Monthly/Quarterly/Yearly Performance Journals
  - Flexible Forms
  - Automated Work flow
  - Automated E-mail Reminders

3:-<u>Purpose of the Document</u>

- This document contains the Description of Process Flow and Workflow of Management By Objective(MBO) Application.

  Scope of the Document:-
- <u>This document covers the Process Workflow and Functionalities Detail.</u>
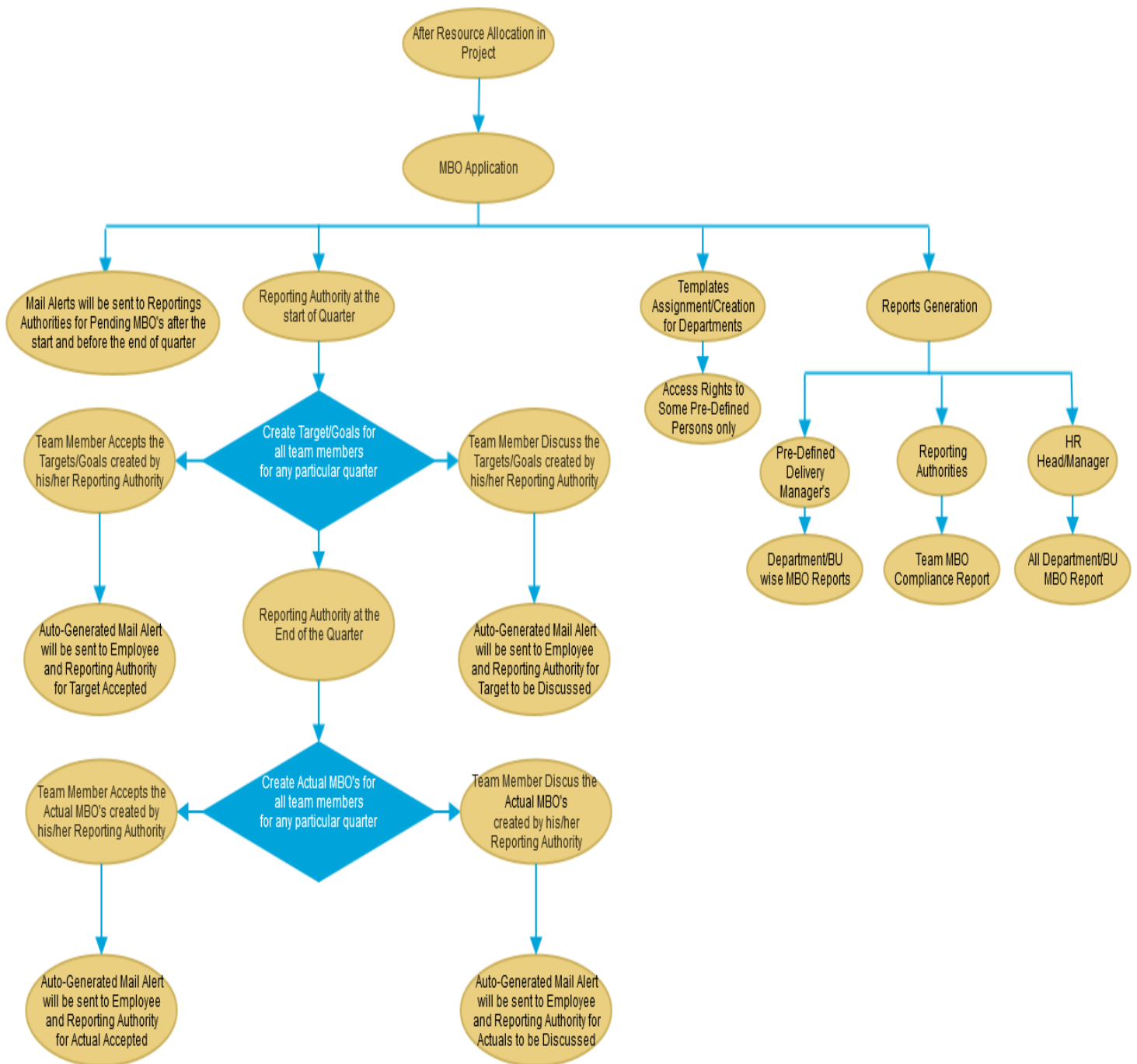
4:-Process Flow

Process Flow

Filling of MBO by Reporting Authority

↓

Adding / Editing MBO

↓

Acceptance / Discussion of MBO by Reportee

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Filling of Actual Target versus Assigned Target by Reporting Authority

↓

Acceptance / Discussion of Actual Target versus Assigned Target by Reportee

5:- Access Rights And Privileges

Roles	Access Rights and Privileges
Admin	• This User creates MBO templates(forms) and assign them to various designations and departments • This User can modify MBO application Locking/Unlocking period
Reporting Authority	• This user has to fill target/achievement values for all his/her subordinates only • He/She may add comments on his/her subordinates' MBOs • He/She may add monthly comments on his/her subordinates' MBOs • He/She may view his/her subordinate's MBO history • He/She may escalate his/her subordinate's MBO to higher Reporting Authority, if required • He/She may update his/her subordinate's MBOs Grades • This user has all the rights as that of an employee (as listed under)
Employee	• This user has rights to accept/discuss targets/achievements of himself/herself but cannot edit them • He/She may add comments on his/her MBO • He/She may view monthly comments on his/her MBO • He/She may view his/her own MBO history

6:- MBO Workflow Diagram

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                          After Resource Allocation in
                                    Project
                                       │
                                       ▼
                               MBO Application
                                       │
        ┌──────────────┬───────────────┴────────────────┬──────────────────┐
        ▼              ▼                                  ▼                  ▼
 Mail Alerts will   Reporting Authority          Templates            Reports Generation
 be sent to         at the start of Quarter      Assignment/Creation
 Reportings                                       for Departments
 Authorities for                                        │
 Pending MBO's                                          ▼
 after the start                                 Access Rights to
 and before the                                  Some Pre-Defined
 end of quarter                                  Persons only
```

Reporting Authority at the start of Quarter → Create Target/Goals for all team members for any particular quarter

- Team Member Accepts the Targets/Goals created by his/her Reporting Authority
  - Auto-Generated Mail Alert will be sent to Employee and Reporting Authority for Target Accepted
- Team Member Discuss the Targets/Goals created by his/her Reporting Authority
  - Auto-Generated Mail Alert will be sent to Employee and Reporting Authority for Target to be Discussed

Reporting Authority at the End of the Quarter → Create Actual MBO's for all team members for any particular quarter

- Team Member Accepts the Actual MBO's created by his/her Reporting Authority
  - Auto-Generated Mail Alert will be sent to Employee and Reporting Authority for Actual Accepted
- Team Member Discus the Actual MBO's created by his/her Reporting Authority
  - Auto-Generated Mail Alert will be sent to Employee and Reporting Authority for Actuals to be Discussed

Reports Generation:
- Pre-Defined Delivery Manager's → Department/BU wise MBO Reports
- Reporting Authorities → Team MBO Compliance Report
- HR Head/Manager → All Department/BU MBO Report

7:- Reporting Authority and Employee Process At the Start of Quarter

REPORTING AUTHORITY SCREENS
Fill MBO Link(The below screen will be visible to Reporting Authority and Above)

Description:-
- Present quarter and year will be pre-selected and the list of your direct subordinates, in that specific quarter, will be loaded
- You can manually select different quarter and year, to view list of your direct subordinates for that specific quarter
- After selecting proper quarter, list of your direct subordinates, in that quarter, will be loaded

Now, in the list, go at the appropriate record and click on Projection icon and you will be able to see the screen as under:

Description:-
- Here Above Template will be loaded for the employee as per his/her designation.
- After that the Goals and Parameters needs to be selected as per the requirement
- Soft Factors can be added as per the requirement.
- It can Saved or Submitted Accordingly(Email will be sent once the RA clicks on Submit)

Click on Add/Edit icon

- Here as shown above RA can fill the up the necessary details or he can edit the same.
- After clicking Save the target will be saved and then once he finally submits the target will be created.
- This target will be visible to the employee when he/she logins to his intranet and clicks on his MBO

Employee Screens
After all the above steps , the next will be the employee role

- After creating targets for the quarters by Reporting Authority ,the employee will be able to view the created target by
- Clicking on View MBO screen as shown above for the current quarter
- Employee can click on Action icon to take the necessary action mentioned below

After clicking the Action above employee can either accept or discuss the target that is created for the quarter

Management by Objectives [MBO]

Welcome **Kaushal Kumar**

▼ Employee

View MBO

MBO History

View Monthly Comments

Guidelines

▶ Reporting Authority

MBO Creation

Name: Kaushal Kumar
Email: krishna.panchal@einfochips.com
MBO Month: Q3 - (Oct - Dec) 2015

Factor	Goal	Parameter	Project	Target	Actual
Hard Factors (70%)	Attrition (10%)	Attrition (10%)	All Projects(10%)	10 %	
	Project execution (15%)	Project execution (15%)	All Projects(15%)	90.01	
	Customer Satisfaction (5%)	Customer Satisfaction (5%)	All Projects(5%)	4.01	
	Gross Margins (15%)	Gross Margins (15%)	All Projects(15%)	90.01	
	Revenue Target (25%)	Revenue Target (25%)	All Projects(25%)	90.01	
Soft Factors (30%)	Disciplined Project Execution (30%)	Measurement of applicable metrics, reviewing the Metrics and PMR and submitting and Driving actions based on that, at regular period to internal & cus (30%)	All Projects(30%) **Comments:** test	**Comments:** test	

Comments:
(2000 characters)

[**Accept**] [**Discuss**]

8:- Reporting Authority and Employee Process At the End of Quarter

REPORTING AUTHORITY SCREENS

At the end of every quarter the Reporting Authority will fill up the Actual Target as compared to the target which was created at the start of quarter.

As shown in the above screen at the end of quarter Reporting Authority will click on closure shown above and will fill up the actuals for the employees

When RA clicks on Closure then below screen appears.

After clicking on the edit in front of the loaded parameters Reporting Authority will fill up the actuals

After clicking Edit the below screen appears As below

As shown in the above screen the RA will fill up the Actual Target same like at the time of creation of Target and update it After this RA will Submit the Actual Target.

When employees clicks on his View Mbo or MBO History Link after the above step As below:

As shown above Employee is able to see the Status of MBO as Actual Created for the current quarter in View MBO if the MBO
Actuals is filled up before quarter ends. If the MBO Actuals is filled up by RA after the quarter ends then the employee can click on
MBO History Link and select the quarter and year and check his actuals.

After clicking on Action

As shown above Employee can see his actuals and he has the provision to either accept or discuss.

After clicking Team MBO As below:

As shown above after clicking Team MBO the list of MBO's of the Employees under RA will be displayed.
From this RA can see the history of the MBO of any employees under him or he can also click view team to see the list of employees Reporting to that employee (if any).

After clicking the Fill Monthly Comments RA

RA can fill up the Monthly Comments for any employees under him from the above screen by clicking the green icon.

After clicking the Monthly Comments Report Reporting

Reporting Authority can see the relevant Comments details month wise for the whole quarter

After clicking the Team Compliance Report Here

Here the RA will be able to see the MBO details of all the employees hierarchy under him.