Group B: Employee Performance Management System - Deliverable 2

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GitHub: https://github.com/Programmermandan/IS436-GroupB.git

Project plan board: https://github.com/users/Programmermandan/projects/4

(Time set aside to meet outside of class is included in the GitHub board)

<u>Requirements Definition</u>

The Employee Performance Management System (EPMS) is a data-driven procedure that aims to boost employees' overall performance and productivity inside the firm. The system seeks to provide an efficient and transparent procedure for goal setting, progress monitoring, and performance evaluation. The EPMS will promote employee productivity and foster a culture of continuous improvement by streamlining the performance evaluation process. The system will address both functional and non-functional needs to drive organizational success by incorporating input from many stakeholders. This paper defines the EPMS project's functional and non-functional requirements.

Functional Requirements for Processes (Information-Oriented):

- Goal Setting: The system should enable managers to set SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) performance objectives for each employee.

- Performance Monitoring: The system should allow employees and managers to track individual and team progress toward goals in real time.

- Performance Evaluation: The system must automate the performance evaluation process, enabling managers to conduct objective evaluations based on established performance criteria.

- Feedback Management: Throughout the performance cycle, the system should support constant feedback and coaching between managers and employees.

- Development Plans: The system must enable the design and monitoring of personalized development plans for employees in order to improve their abilities and advance their careers.

- Notifications and Reminders: The system must provide automated notifications and reminders to employees and other stakeholders.

Non-Functional Requirements:

- Employee Profiles: The system must keep detailed profiles of all employees, including personal information, job details, and performance history.
- Performance Metrics: The system must capture and store data related to performance, such as key performance indicators (KPIs), ratings, and feedback recordings.
- Historical Performance Reports: The system must provide historical performance reports for individual individuals and teams in order to assess patterns and suggest areas for development.

Requirements for Operation:

- User Access Control: To ensure that users may only access information related to their jobs and responsibilities, the system must implement role-based access control.
- Data Backup and Recovery: To avoid data loss, the system must perform frequent data backups and have a strong recovery mechanism in place in the case of a system failure.
- Data Privacy and Compliance: The system must follow data privacy standards and ensure that sensitive employee data is securely stored and accessed only by authorized persons.

Performance Expectations:

- Response Time: To offer a flawless user experience, the system must respond to user actions within a maximum of 2 seconds.

- Scalability: As the organization grows, the system should be able to handle an increasing number of users and performance data.

Security Requirements:

- Data Encryption: To secure data transit and storage from unauthorized access, the system must employ encryption technologies.
- Authentication and Authorization: To validate user identities, the system must use strong authentication mechanisms such as multi-factor authentication.
- Audit Trails: To track user behaviors and detect potential security breaches, the system must keep extensive audit trails.

Cultural/Political Requirements:

- Inclusivity and Bias Mitigation: The system must be structured to prevent bias in performance evaluation and to promote inclusivity in goal setting and feedback processes.
- Transparency: The system shall foster transparency by clearly conveying to all employees the performance management process and its objectives.

Interview Information

Interviewee: Dana Stuart

Position: Human Resources

Date and Time: 10/05/2023, 10:00 AM

Interviewer: Mikael Phillips

Questions:

1. What are the current problems that the HR department is facing in terms of managing employee performance?

2. How do you now track and evaluate employee performance?

3. What characteristics do you want to see in an ideal Employee Performance Management System?

4. What security safeguards do you believe should be in place to safeguard sensitive employee data?

5. How do you envision the system handling performance feedback and development plans?

Interviewee: Nala Rand

Position: Marketing Manager

Date and Time: 05/15/2023, 3:30 PM

Interviewer: Jonny James

Questions:

1. How do you now set performance targets for members of your team?

2. How regularly do you deliver performance comments to your team members?

3. What data or metrics would you find most useful in evaluating the performance of your team?

4. How do you want the system to provide ongoing performance coaching and mentoring?

5. Are there any cultural or political concerns to keep in mind as this system is implemented?

Observation Notes

EPMS System: PerformYard

- This EPMS system is very cost efficient, only $1 to $10 a month compared to others that are expensive; some others are $49 to $99.

- Includes a free demo unlike other companies.

- Simplifies complex reviews .

- Gives 360 degree feedback, tracks progress, and focuses on goal management.

- PerformYard offers comprehensive expert-level support with every contract, without any additional costs.

- PerformYard enhances human interaction and seamlessly integrates with face-to-face meetings, ensuring that performance management processes are not hindered but rather facilitated.

- PerformYard empowers you to create a tailored performance management process that aligns perfectly with your company culture.

- The product's versatility and depth cater to the diverse needs of all types of organizations.

- PerformYard offers a comprehensive solution for managing performance review cycles, check-ins, goals, and feedback, providing everything you need in one integrated platform.

- PerformYard streamlines performance review data collection through automatic processes, while also providing robust reporting and analytics capabilities to help you gain valuable insights from the data.

- Constant 1:1 feedback.

- PerformYard may not be the optimal choice for small organizations with fewer than 20 employees. The intricacy of managing performance processes at that scale might not warrant the investment in a software solution of PerformYard's caliber.

Questionnaires

1. How would you rate the effectiveness of the current performance management process in the organization? (Scale: 1 - Very Ineffective to 5 - Very Effective)
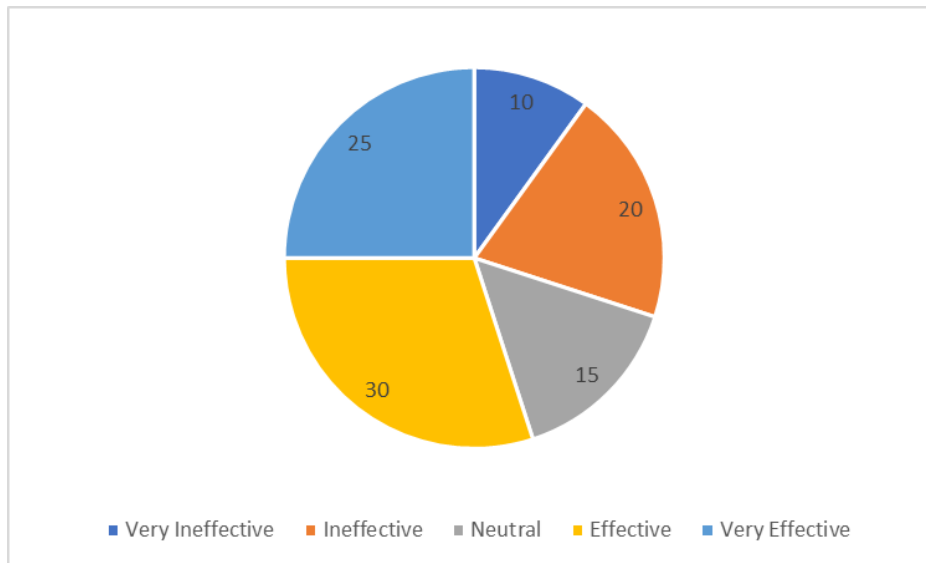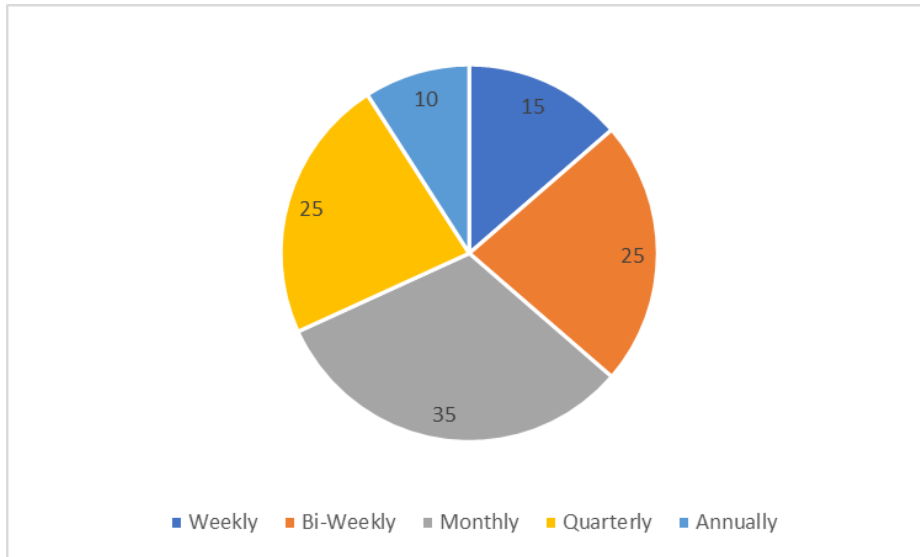

2. Do you find the current performance management process to be challenging or time-consuming?
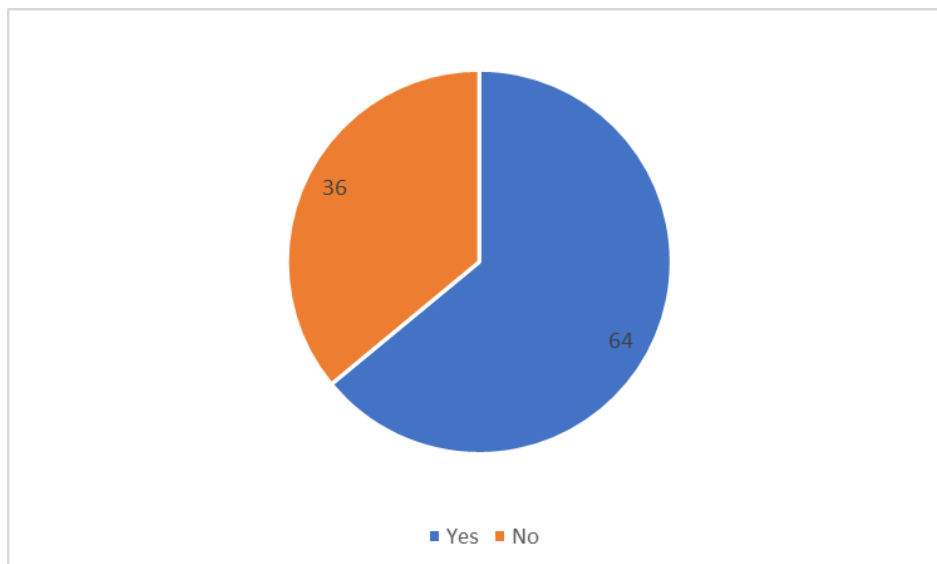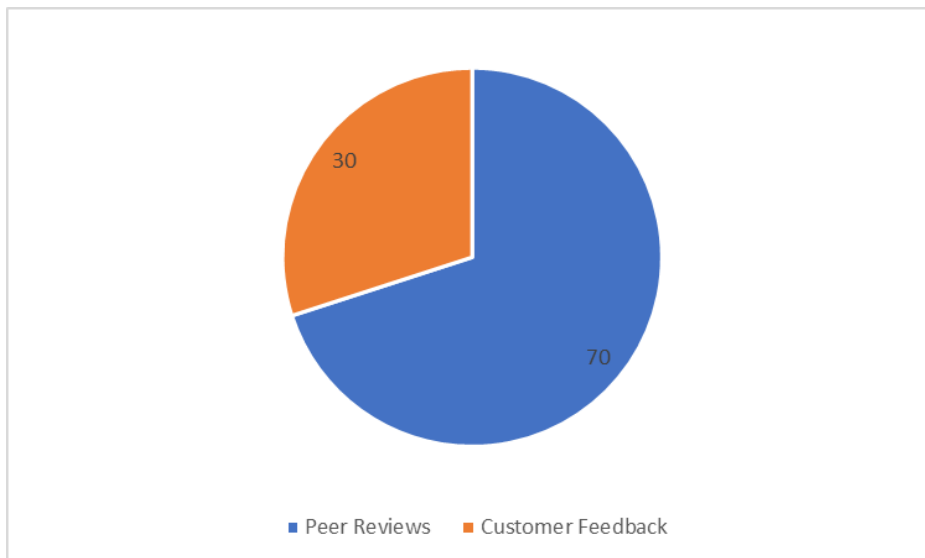
3. How often would you prefer to receive performance feedback from your manager?

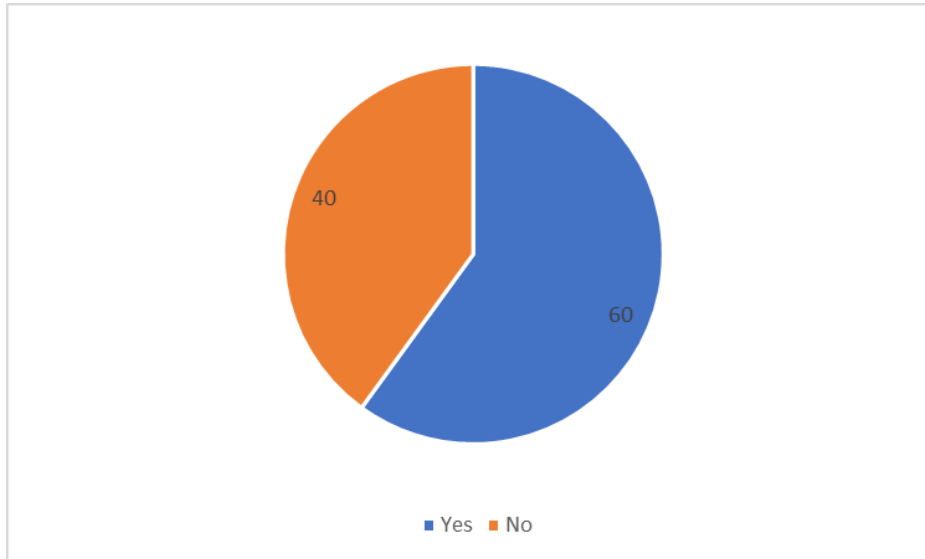(Options: Weekly, Bi-weekly, Monthly, Quarterly, Annually, Other)

4. Which do you find more useful to track your progress and achievements: peer reviews or customer feedback?
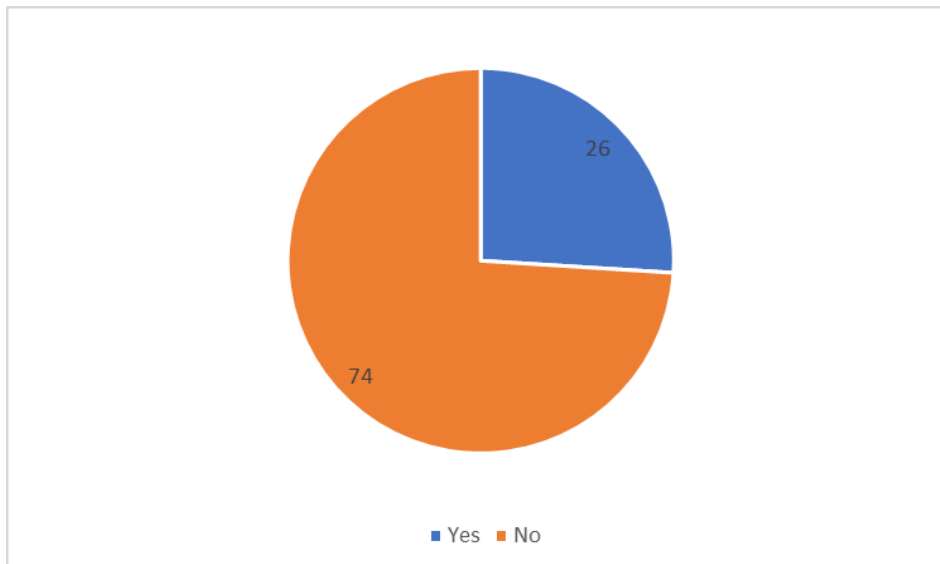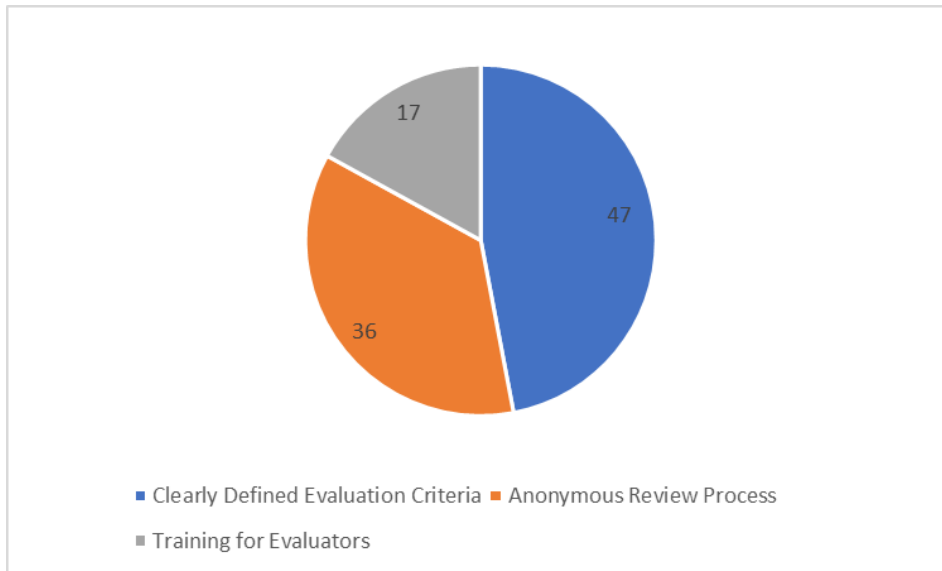
5. Would you like the system to provide the ability to set and track individual development goals?

6. Do you have any concerns or preferences related to data privacy and security within the EPMS?

7. In your opinion, how can the EPMS promote a fair and unbiased performance evaluation process?

17

47

36

■ Clearly Defined Evaluation Criteria ■ Anonymous Review Process
■ Training for Evaluators

8. How important is it for the EPMS to integrate with existing HR systems or tools?

45

55

■ Important ■ Not Important
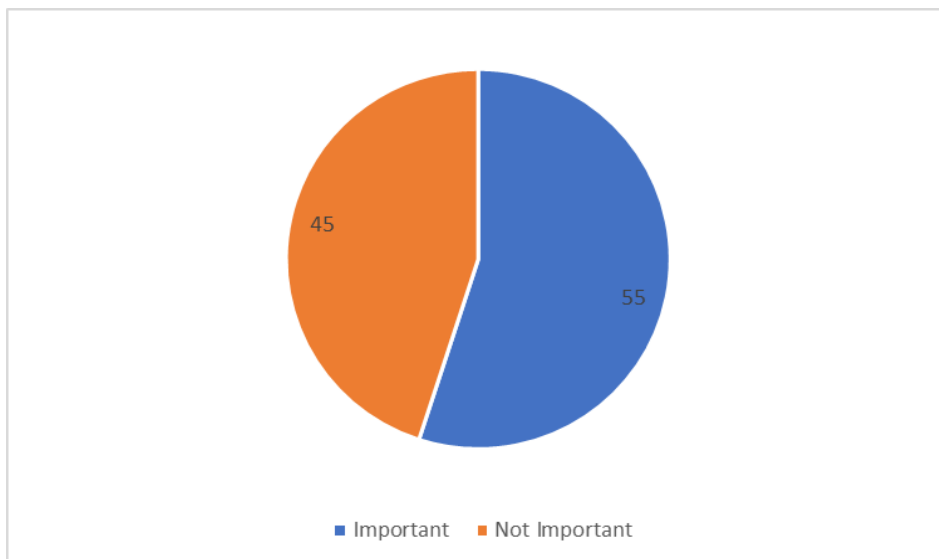
Document Analysis

Document Analyses for PerformYard

PerformYard Reviews & Ratings 2023. TrustRadius. (2023, March 13).

https://www.trustradius.com/products/performyard/reviews?qs=pros-and-cons#overview

- We used this document because it provided an overall overview of the company's
  reviews. It is important to consider the pros and cons of the company because as much as
  it was rated very high, there were a few disapproving reviews. However, they were
  outweighed by the amount of people who really liked the company.

10 Best Employee Performance Management Software Systems in 2023. Software Testing Help.
(2023, June 26). https://www.softwaretestinghelp.com/performance-management-software/

- We used this source because it narrowed down many good EPMS systems so we could
  see what other companies are doing and implementing in their EPMS'. We found three
  other systems: Leapsome, Bambee, and Deel; however, upon review, we felt that
  PerformYard is a much more trusted system that we can review to see how we can
  improve our own EMPS.

Employee performance management solutions by Performyard. PerformYard. (n.d.).

https://www.performyard.com/product-tour

- This document is the actual website for the EPMS. This document allowed us to see how
  the EMPS markets themselves and attracts people to use their EPMS. Marketing is a very
  valid and important factor to consider when developing a company as well as everything
  else that goes into it.

PerformYard - Crunchbase Company Profile & Funding. Crunchbase. (n.d.).

https://www.crunchbase.com/organization/performyard

- Similar to our first document, this source allows us to see the different features and factors they can improve from a consumer's perspective. This helps us see what other requirements we can add into our EMPS to be customer friendly and allow our customers to be satisfied with our development.

Use Case Documents and Diagrams

Use Case 1: Set Employee Goals

Use Case ID: UC-001

Description: This use case allows employees and managers to set and update individual and team goals within the EPMS. Goals are aligned with the organization's objectives, contributing to better performance management.

Primary Actor: Employee & Manager

Preconditions:

- The user (employee or manager) must be logged into the EPMS.

Main Success Scenario:

i.   The user selects the "Set Goals" option from the EPMS dashboard.

ii.   The system presents the user with a form to input their goals, including specific objectives, key performance indicators, and target completion dates.

iii.   The user fills in the required information and submits the form.

iv.   The system validates and saves the entered goals in the database.

v. If the user is a manager, they can review and approve the employee's goals, providing feedback if necessary.

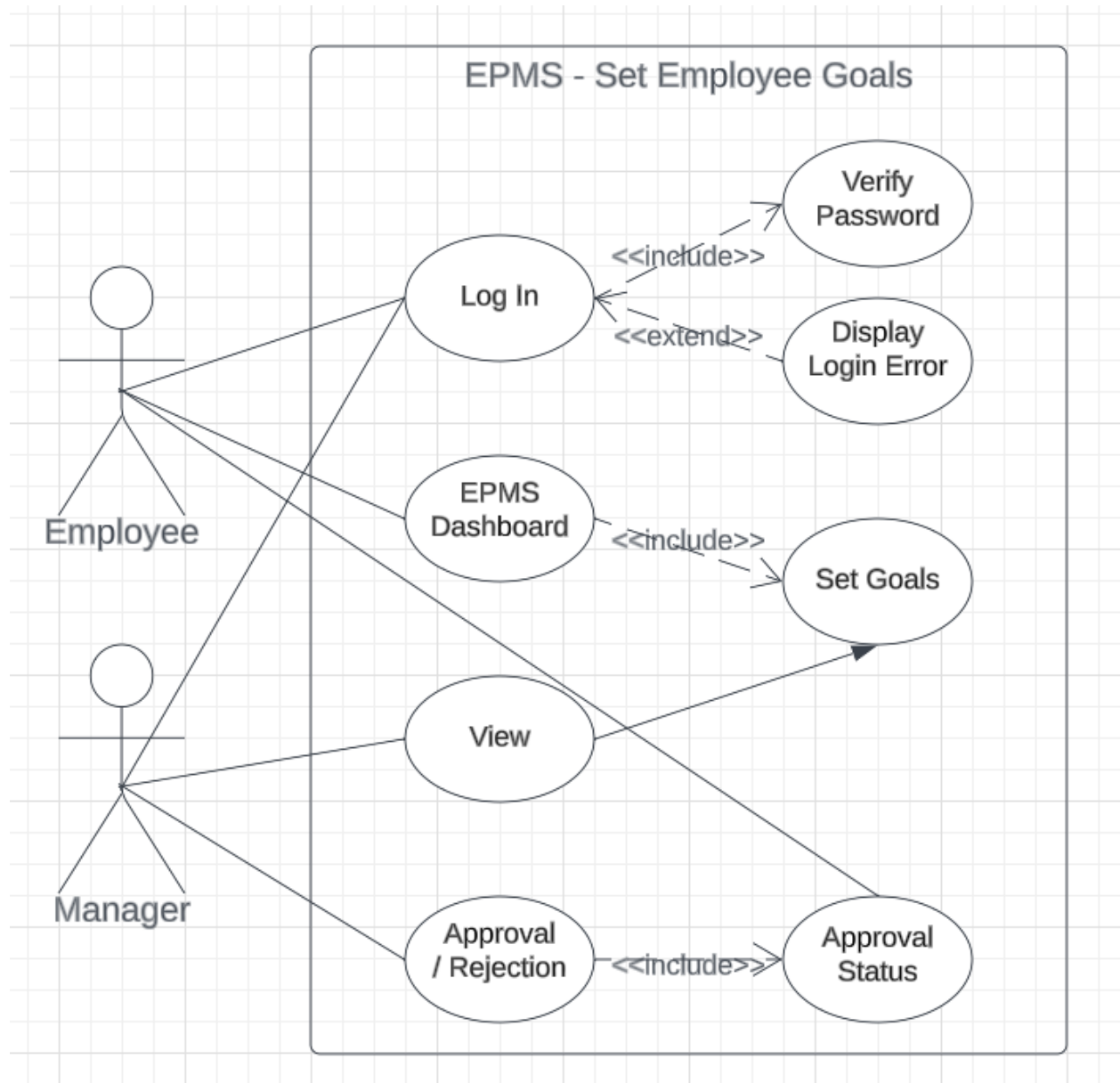vi. The system notifies the employee and manager of the goal approval status.

Extensions:

- If the user wants to update existing goals, they can select the "Update Goals" option and follow the same steps as in the basic flow. If the manager rejects the employee's goals, the system provides a mechanism for the employee to revise and resubmit them.

Frequency of Use: High

Status: In progress

Priority: High

EPMS - Set Employee Goals

Verify Password

<<include>>

Log In

<<extend>>

Display Login Error

EPMS Dashboard

<<include>>

Set Goals

View

Employee

Manager

Approval / Rejection <<include>> **Approval Status**

Use Case 2: Conduct Performance Evaluation

Use Case ID: UC-002

Description: This use case enables managers to conduct performance evaluations for their employees based on the predefined performance criteria within the EPMS.

Primary Actor: Manager

Preconditions:

- The user (manager) must be logged into the EPMS.

- The employee's goals and performance data must be available in the system.

Main Success Scenario:

i. The manager selects the "Conduct Performance Evaluation" option from the EPMS dashboard.

ii. The system presents a list of employees assigned to the manager for evaluation.

iii. The manager selects an employee from the list.

iv. The system retrieves the employee's goals and performance data, displaying them for evaluation.

v. The manager rates the employee's performance against each goal and provides comments if needed.
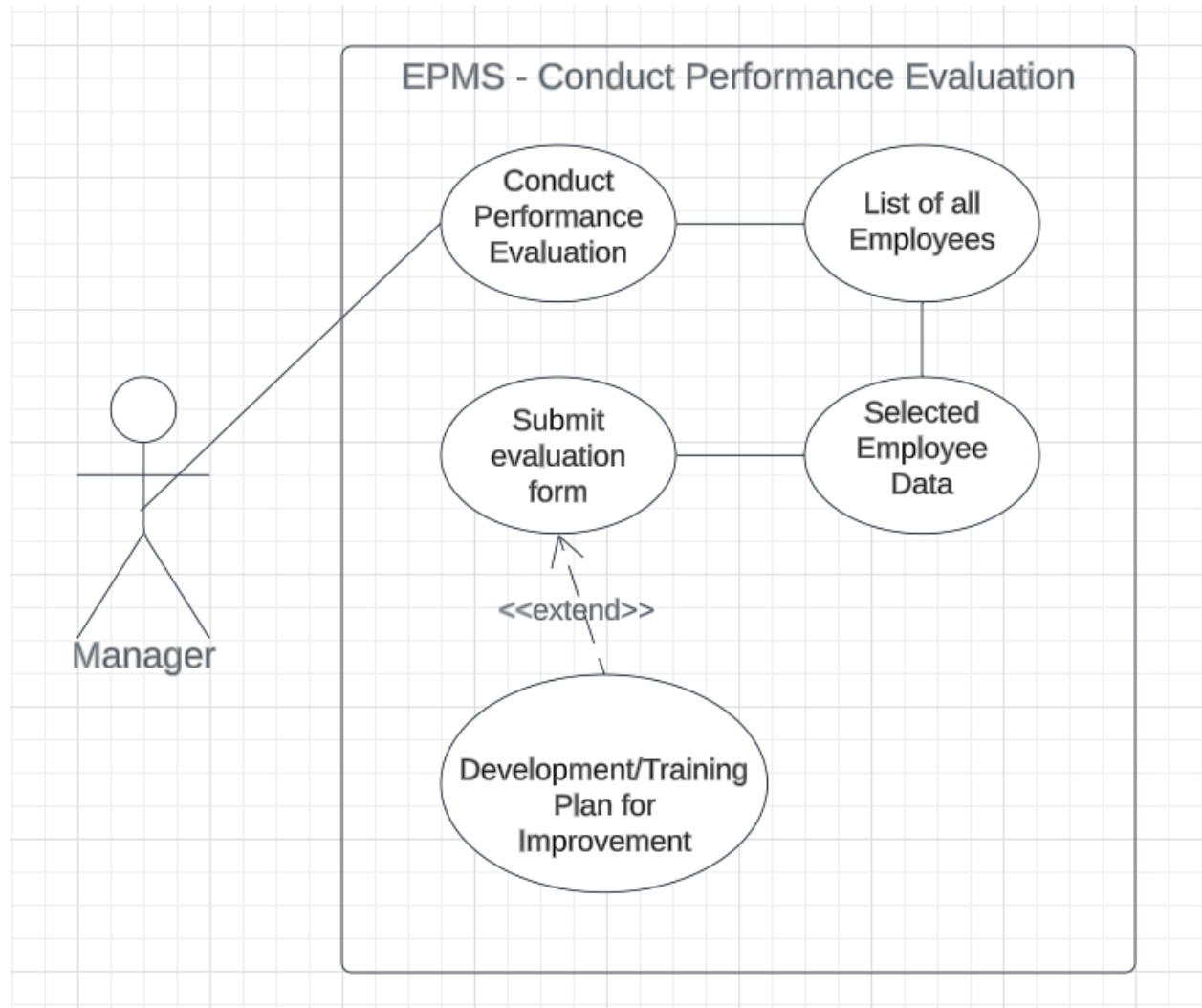
vi. The manager submits the evaluation form.

Extensions:

- If the manager identifies areas for improvement during the evaluation, the system allows them to initiate training and development plans for the employee.

Frequency of use: Periodic

Status: In Progress

Priority: Medium

EPMS - Conduct Performance Evaluation

Use Case 3: Plan Skill Development and Training

Use Case ID: UC-003

Description: This use case enables managers and HR personnel to plan and assign skill development and training programs for employees based on their performance evaluation results and identified improvement areas.

Primary Actor: Manager & HR Personnel

Preconditions:

- The user (manager or HR personnel) must be logged into the EPMS.

- The employee's performance evaluation data must be available in the system.

Main Success Scenario:

i. The user selects the "Plan Skill Development and Training" option from the EPMS dashboard.

ii. The system presents a list of employees eligible for skill development and training based on their performance evaluation results.

iii. The user selects an employee from the list.

iv. The system displays the employee's evaluation results and identifies the areas for improvement.

v. The user chooses appropriate skill development and training programs from the available options.

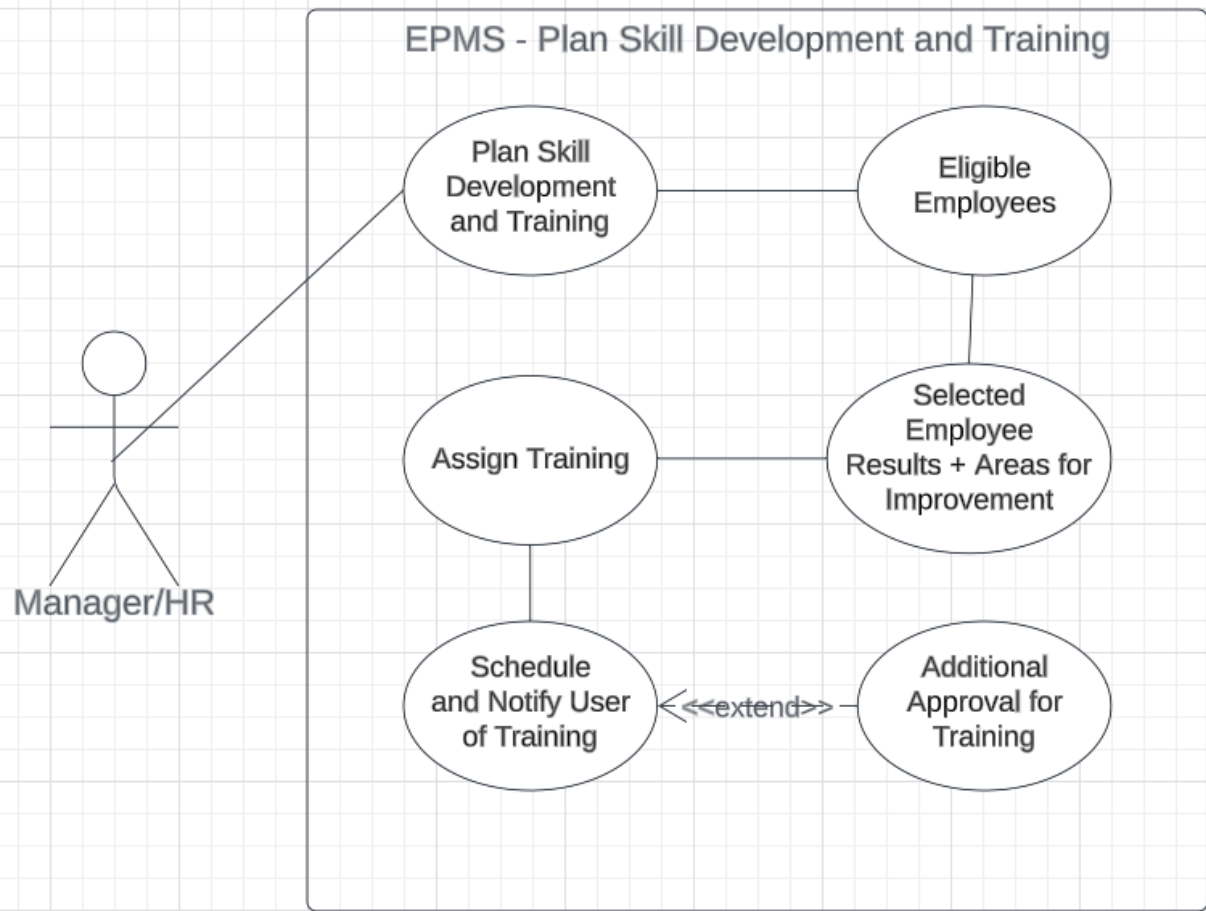vi. The system schedules the selected training for the employee and notifies them.

Extensions:

- If additional approvals are required for certain training programs, the system notifies the relevant personnel and waits for their confirmation.

Frequency of use: As needed

Status: In progress

Priority: Medium

Use Case 4: Provide Ongoing Feedback

Use Case ID: UC-004

Description: This use case enables employees and managers to engage in continuous feedback and coaching throughout the performance cycle within the EPMS.

Primary Actor: Employee & Manager

Preconditions:

- The user (employee or manager) must be logged into the EPMS.

Main Success Scenario:

i. The user selects the "Ongoing Feedback" option from the EPMS dashboard.

ii. The system presents a list of employees (if the user is a manager) or a list of peers and managers (if the user is an employee) for feedback purposes.

iii. The user selects an employee or peer from the list to provide feedback to.

iv. The system presents a feedback form where the user can enter feedback for the selected employee or peer.

v. The user provides constructive feedback, highlighting strengths and areas for improvement. If the user is a manager, they can also suggest development actions or training opportunities based on the feedback.

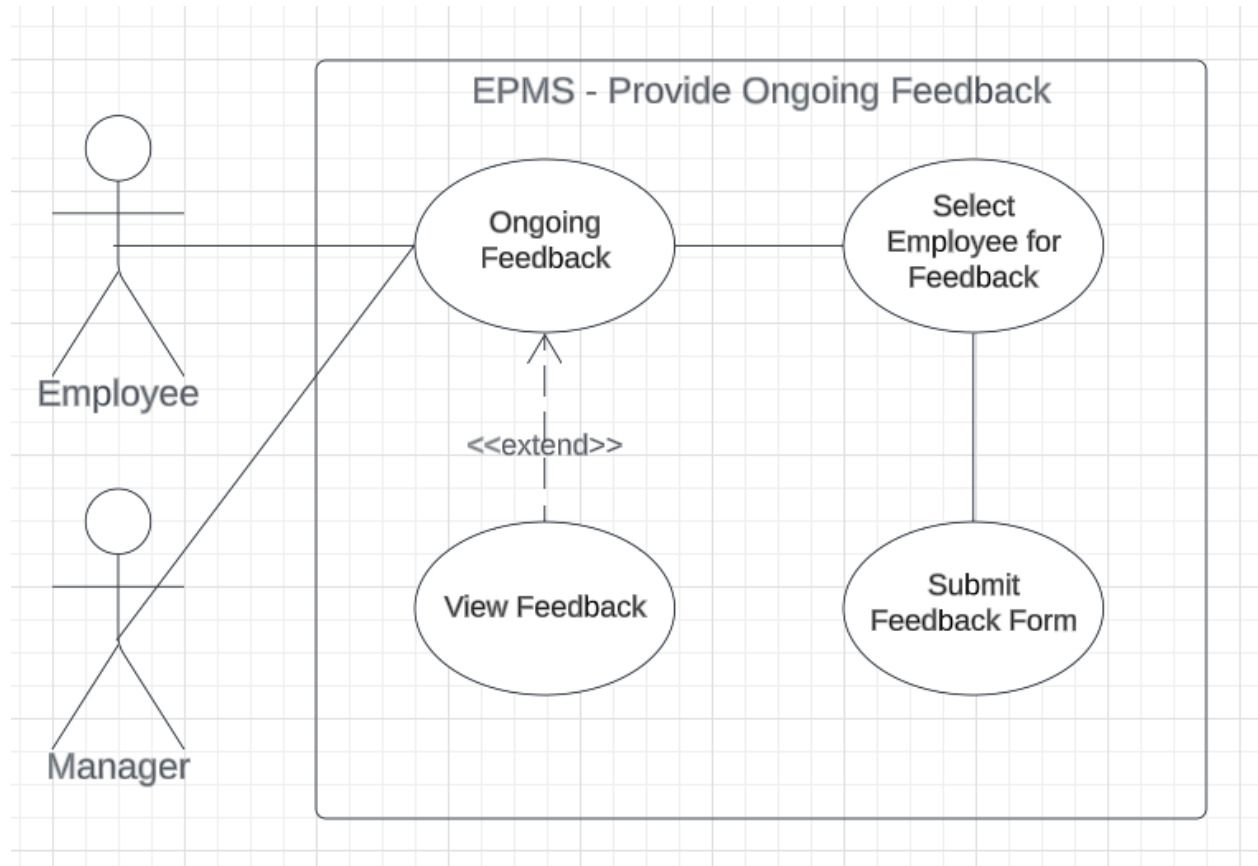vi. The user submits the feedback form, and the system saves the feedback data.

Extensions:

● If the user wants to view feedback received from others, they can access the "Feedback Received" section on the EPMS dashboard.

Frequency of use: Continuous

Status: In progress

Priority: High

Use Case 5: Generate Performance Reports

Use Case ID: UC-005

Description: This use case allows managers and HR personnel to generate performance reports for individual employees and teams, providing valuable insights and supporting decision-making within the EPMS.

Primary Actor: Manager & HR Personnel

Preconditions:

● The user (manager or HR personnel) must be logged into the EPMS.

● The employee's performance evaluation data must be available in the system.

Main Success Scenario:

- The user selects the "Generate Performance Reports" option from the EPMS dashboard.

- The system presents a list of employees and teams for which the user can generate reports.

- The user selects an employee or team from the list.

- The system retrieves the performance evaluation data for the selected employee or team.

- The user chooses the type of report to be generated (e.g., individual performance report, team performance summary).

- The system generates the selected report, summarizing performance data and providing visualizations (e.g., charts, graphs).

- The user can export the report as a PDF or Excel file if needed.

Extensions:

- If the user wants to compare performance data across multiple employees or teams, the system allows them to select multiple items from the list in step 3.

Frequency of use: Low

Status: In progress

Priority: Low

EPMS - Generate Performance Reports

Generate Performance Reports

Type of Report

Selected Employee + Data

Generate Report

<<extend>>

Compare Performance Data

Export Report

Manager/HR