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Performance Management System

Process and Guidelines effective 1st April 2024

Performance Management - Process and Guidelines documents provide the appraisal eligibility criteria and shall be applicable to all employees working in LatentView Analytics across all levels and locations. We follow a 180-degree appraisal process, and this document covers the performance evaluation eligibility criteria, evaluation period, and guidelines and timelines of the process.

Performance review period:

- Biannual Appraisal - April to September and October to March
- Annual Appraisal - April – March

Biannual Performance Review Eligibility:

Employees from level 1 to level 3 will be eligible for the biannual performance review based on the below table.

Performance Review Period	Eligibility
April to September	Joined on or before 31 st May
October to March	Joined on or before 30 th November

Annual Performance Review Eligibility:

Employees from level 4 and above levels will be eligible for the annual performance review based on the below table.

Performance Review Period	Eligibility
April to March	Joined on or before 30 th September

Process timelines:

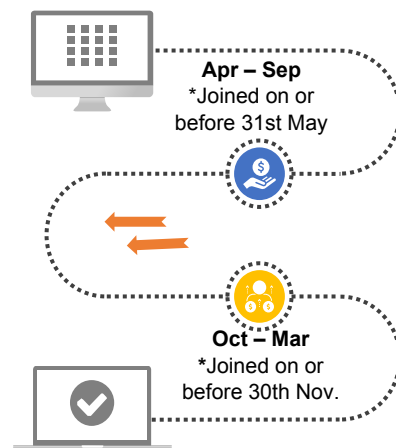
Goal Setting	Beginning of the appraisal cycle
Monthly Review	1 st week of every month
Self-Evaluation	1 st week of the 5 th /11 th month of each cycle
Manager Evaluation	3 rd week of the 5 th /11 th month of each cycle

Performance Review Stagewise Process:



Stage 1 – Goal Setting:

- Goal setting discussion between employee and manager to set goals at the beginning of every performance review period.
- Employees need to record their goals in the goal sheets
- Goals are structure based on the 4 dimensions – Delivery, Organization Development (OD), Business Development (BD)/Functional Development (FD) and People Management (PM) dimension for L3+ has been included.



- Every goal dimension (Delivery, OD, BD and PM) has been further classified into sub-goals and a dimensional weightage is added to it
- There are standard weightages defined according to level and career tracks of employees

Know more about the details of the dimension-wise weightages in the [here](#)

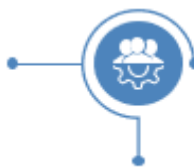
Know more about the details of the dimension in the [Object Performance Evaluation Document](#) [click here](#)



Stage 2 - Monthly Reviews:

Managers and employees are expected to connect on a monthly basis to evaluate the progress of the goal accomplishments and ensure continuous feedback is given.

Stage 3 – Self Evaluation:



- Employees record their achievements in the current cycle and rate their performance in a 5-point scale for the individual dimensions.
- Each dimensional score is calculated based on the SumProduct of the sub-dimensional weightages and sub dimensional scores. The final score is calculated based on the Dimensional weightages and Dimension ratings (refer to you goal sheet for more understanding)

Stage 4 – Manager Evaluation



Managers evaluate, record feedback, and rate the performance of their team members in a 5-point scale for the individual dimensions for every performance review period.

Rating for each dimension will be from 1 to 5 (5 being the highest)

Ratings, Description, and Calculation			
Rating	Description	Lower Band	Upper Band
A+	LatentView Star	4.50	5.00
A	Growth Catalyst	4.00	4.49
B+	Meets Expectations	3.00	3.99
B	Can do better	2.00	2.99
C	Does not meet expectation	1.00	1.99

Performance Category:

- The performance category is calculated based on the current rating and the previous rating (for L1 to L3) obtained during the previous appraisal cycles
- The performance category is calculated based on the current rating and the current rating (for L4+) obtained during the previous appraisal cycles
- Using the performance category, the compensation (incentive and increment) percentages, and promotion eligibility are derived
- For employees being rated for the first time their previous rating will be “Not Applicable - NA” and their performance category will be calculated based on the below grid

		Previous rating						
Current rating		A+	A	B+	B	C	NA	
	A+	TT	TT	H	G	C	HP	
	A	TT	H	H	G	C		
	B+	H	H	G	G	C		
	B	G	G	CP	CP	C		
	C	CP	CP	CP	PP	P		
Performance Category								
								TT – Top Talent
								HP – High Performer
								GP – Good Performer
								CP – Consistent Performer
								PP – Potential Performer

NA – Rating not applicable

Dimensions and Weightage Guidelines:

Each employee’s goal is defined across Delivery, Organizational Development, Business Development, Process/ Outcome (Growth Team), Functional Development (Enablement Team), People Management

The goals are categorized into 4 dimensions as detailed below:

Dimension	Description
Delivery	Delivery dimension is primarily derived from Delivery Excellence Level, Delivery Issues and Voice of Customer (VoC) survey . The SDE team will provide a Delivery Metric score which is a combination of Delivery Excellence and VoC scores. The entity leaders and managers are encouraged to use these scores as a reference to evaluate the goal accomplishments during the performance appraisal discussion.
Organizational Development (OD)	Organizational Development dimension assesses the employee's contribution to Org wide initiatives (inter and intra function).
Business Development (BD)	Business Development dimension assesses the employee's contribution towards business growth.
People Management (PM)	People Management dimension assesses employees' people management competence. Note: Managers/Entity leads can use the quarterly pulse surveys scores to assess the people managers on this dimension.

Know more about Dimensions and Weightages specific to your role in the below career tracks

- [Delivery Offshore L1 to L4](#)
- [Delivery Onsite L1 to L4](#)
- [Delivery Above L5](#)
- [Horizontal Value Props](#)
- [Horizontal Expertise](#)
- [Horizontal Governance](#)
- [Growth](#)
- [Consulting](#)
- [SDE](#)

Annexure 1

WEIGHTAGE GUIDELINES ACROSS LEVELS - DELIVERY OFFSHORE (L1 - L4)

Delivery	Weightages
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latentview

Dimensions	L1	L2	L3	L3	L4	L4
Delivery	70%	60%	50%	60%	40%	40%
Organisation Development	20%	20%	20%	20%	20%	20%
Business Development	10%	20%	20%	20%	30%	40%
People Management			10%		10%	
Total	100%	100%	100%	100%	100%	100%

Delivery Dimension	Weightages			
Sub- Dimensions	L1	L2	L3	L4
Delivery Excellence (DEL Insights)	45%	45%	40%	40%
VoC Score	45%	45%	50%	50%
Issue Tracker	10%	10%	10%	10%
Total	100%	100%	100%	100%

OD	Weightages			
Sub- Dimensions	L1	L2	L3	L4
OD Initiatives	70%	70%	90%	90%
Skill Development (Organizational)	30%	30%	10%	10%
Total	100%	100%	100%	100%

BD	Weightages			
Sub- Dimensions	L1	L2	L3	L4
Participation	100%	100%	40%	
Revenue			60%	100%
Total	100%	100%	100%	100%

Annexure 1.1

WEIGHTAGE GUIDELINES ACROSS LEVELS - DELIVERY OFFSHORE (L5+)

Delivery	Offshore Weightages		
Dimensions	L5	L6	L7



LatentView

Delivery	20%	20%	20%
Organisation Development	20%	20%	20%
Business Development	40%	50%	50%
People Management	20%	10%	10%
Total	100%	100%	100%

Delivery Dimension	Weightages			
Sub- Dimensions	L5	L5 Entity Lead	L6	L7
Value Stories (DEL 2+)	20%	20%	20%	20%
CSAT Projects handled/ Entity	20%	20%	20%	20%
Quality Index	20%	20%	20%	20%
Attrition %	20%	20%	20%	20%
Employee Engagement Index	20%	20%	20%	20%
Total	100%	100%	100%	100%

OD Dimension	Weightages			
Sub- Dimensions	L5	L5 Entity Lead	L6	L7
Org Recognition (Awards)	100%	100%	100%	100%
Total	100%	100%	100%	100%

BD Dimension	Weightages			
Sub- Dimensions	L5	L5 Entity Lead	L6	L7
Revenue Outcome	100%	100%	100%	100%
Total	100%	100%	100%	100%

Applicable for all Onsite Delivery Teams

Delivery	Weightages				
Dimensions	L2	L3	L3	L4	L4
Delivery	60%	40%	50%	30%	40%
Organisation Development	20%	20%	20%	20%	20%
Business Development	20%	30%	30%	40%	40%

		10%		10%	
Total	100%	100%	100%	100%	100%

Delivery	Weightages		
Sub- Dimensions	L2	L3	L4
Delivery Excellence (DEL Insights)	45%	40%	40%
VoC Score	45%	50%	50%
Issue Tracker	10%	10%	10%
Total	100%	100%	100%

OD	Weightages		
Sub- Dimensions	L2	L3	L4
OD Initiatives	70%	90%	90%
Skill Development (Organizational)	30%	10%	10%
Total	100%	100%	100%

BD	Weightages		
Sub- Dimensions	L2	L3	L4
Participation	100%	40%	
Revenue		60%	100%
Total	100%	100%	100%

WEIGHTAGE GUIDELINES ACROSS LEVELS - DELIVERY ONSITE (L5+)

Delivery	Offshore Weightages		
Dimensions	L5	L6	L7
Delivery	20%	20%	20%
Organisation Development	20%	20%	20%
Business Development	40%	50%	50%
People Management	20%	10%	10%
Total	100%	100%	100%

Delivery	Onsite Weightages		
Dimensions	L5	L6	L7
Delivery	20%	20%	20%
OD	15%	15%	15%
BD	50%	50%	50%
PM	15%	15%	15%
Total	100%	100%	100%

Delivery Dimension	Weightages			
Sub- Dimensions	L5	L5 Entity Lead	L6	L7
Value Stories (DEL 2+)	20%	20%	20%	20%
CSAT Projects handled/ Entity	20%	20%	20%	20%
Quality Index	20%	20%	20%	20%
Attrition %	20%	20%	20%	20%
Employee Engagement Index	20%	20%	20%	20%
Total	100%	100%	100%	100%

OD Dimension	Weightages			
Sub- Dimensions	L5	L5 Entity Lead	L6	L7
Org Recognition (Awards)	100%	100%	100%	100%
Total	100%	100%	100%	100%

BD Dimension	Weightages			
Sub- Dimensions	L5	L5 Entity Lead	L6	L7
Revenue Outcome	100%	100%	100%	100%
Total	100%	100%	100%	100%

Annexure 3

WEIGHTAGE GUIDELINES ACROSS LEVELS - HORIZONTALS – VALUE PROP

Delivery	Weightages - Value Prop			
Dimensions	L1/L2 Value Prop	L3 Value Prop	L4 Value Prop	L5 Value Prop
Delivery	70%	40%	20%	10%
OD	20%	20%	20%	20%
BD	10%	30%	50%	60%
PM		10%	10%	10%
Total	100%	100%	100%	100%

Delivery	Weightages - Value Prop			
Sub- Dimensions	L1/ L2 Value Prop	L3 Value Prop	L4 Value Prop	L5 Value Prop
Value Props/Solution development	80%	70%	70%	70%
(DEL Insights)Delivery Excellence	10%			
VOE (Survey)	10%	10%	10%	10%
Collaboration (within horizontals)		20%	20%	20%
Total	100%	100%	100%	100%

OD Dimension	Weightages - Value Prop			
Sub- Dimensions	L1/ L2 Value Prop	L3 Value Prop	L4 Value Prop	L5 Value Prop
OD Initiatives	90%	90%	90%	90%
Skill Development (Organizational)	10%	20%	10%	10%
Total	100%	100%	100%	100%

BD	Weightages - Value Prop			
Sub- Dimensions	L1/ L2 Value Prop	L3 Value Prop	L4 Value Prop	L5 Value Prop
Participation	80%	20%		
Revenue	20%	80%	100%	100%
Total	100%	100%	100%	100%

Annexure 3.1

WEIGHTAGE GUIDELINES ACROSS LEVELS - HORIZONTALS - EXPERTISE

Delivery	Weightages – Expertise			
Dimensions	L1/L2 Expertise	L3 Expertise	L4 Expertise	L5 Expertise
Delivery	70%	40%	20%	10%
Organisation Development	20%	20%	20%	20%
Business Development	10%	30%	50%	60%
People Management		10%	10%	10%
Total	100%	100%	100%	100%

Delivery Dimension	Weightages – Expertise			
Sub- Dimensions	L1/ L2 Expertise	L3 Expertise	L4 Expertise	L5 Expertise
Value Props/Solution development	80%	20%	20%	20%
Delivery Excellence (DEL Insights)	10%	40%	40%	40%
VOE (Survey)	10%	20%	20%	20%
Collaboration (within horizontals)		20%	20%	20%
Total	100%	100%	100%	100%

OD	Weightages - Expertise			
Sub- Dimensions	L1/ L2 Expertise	L3 Expertise	L4 Expertise	L5 Expertise
OD Initiatives	70%	80%	90%	90%
Skill Development (Organizational)	30%	20%	10%	10%
Total	100%	100%	100%	100%

BD	Weightages - Expertise			
Sub- Dimensions	L1/ L2 Value Prop/Expertise	L3 Expertise	L4 Expertise	L5 Expertise
Participation	80%	20%		
Revenue	20%	80%	100%	100%
Total	100%	100%	100%	100%

Annexure 3.1

WEIGHTAGE GUIDELINES ACROSS LEVELS - HORIZONTALS - GOVERNANCE

Delivery	Weightage - Governance			
Dimensions	L4 Governance	L5 Governance	L6 Governance	L7 Governance
Delivery	20%	10%	10%	10%
Organisation Development	20%	20%	20%	20%
Business Development	50%	60%	60%	60%
People Management	10%	10%	10%	10%
Total	100%	100%	100%	100%

Delivery Dimension	Weightage - Governance			
Sub- Dimensions	L4 Governance	L5 Governance	L6 Governance	L7 Governance
Value Props/Solution development	70%	70%	70%	70%
VOE (Survey)	10%	10%	10%	10%
Collaboration (within horizontals)	20%	20%	20%	20%
Total	100%	100%	100%	100%

OD	Weightage - Governance			
Sub- Dimensions	L4 Governance	L5 Governance	L6 Governance	L7 Governance
OD Initiatives	90%	90%	100%	100%
Skill Development (Organizational)	10%	10%		
Total	100%	100%	100%	100%

BD	Weightage - Governance			
Sub- Dimensions	L4 Governance	L5 Governance	L6 Governance	L7 Governance
Revenue	100%	100%	100%	100%
Total	100%	100%	100%	100%

Objective Performance Evaluation – Goal Terminologies

1. A. Delivery Goals for Delivery Teams:

Delivery dimension goals are primarily derived from **Delivery Excellence Levels (DEL)**, **Delivery Issues, Voice of Customer (VoC) survey** and **CSAT**. **Delivery Score:** An average of DEL score & VoC score will be calculated to get the employee level Delivery score (this will again be on a scale on 1-5, 5 being the highest). The SDE team will provide the DEL and VoC scores.

Note: We encourage managers to use these scores as a reference to enhance performance evaluation discussion and rate the employees on the dimension.

- a) **Delivery Excellence Level:** The delivery excellence levels are assigned to every deliverable through a business review conducted by the SDE team. During this review process, the SDE classifies the deliverables under different delivery excellence levels as detailed in the **SDE Metric** document.
- b) **Issue Tracker:** Issue tracker is used to record, monitor & track delivery-related pain-points and address them accordingly. This will be used to track delivery-related pain points, prioritize, develop a response, or action plan and monitor them.
- c) **Voice of Customer (VoC) Survey:** SDE team conducts VoC survey for every six-month (January and July) to get the Client (Immediate Stakeholder) feedback and understand the pulse of the customer.

Note: For L1s and L2s, the delivery metric will also be measured using the **project level issue trackers (SDE will share the template) that the project leads will have to maintain (this is mandatory)**. The occurrence of various types of issues, and their frequency, will be compared with the VoC feedback on these issue types. The leads are advised to use this comparative view while appraising the L1s and L2s in their team. **Non-tracking of issues by the leads will impact the final delivery rating of the entire team including the lead.**

d) **Customer Satisfaction Score (CSAT)**

CSAT index is derived from the VoC survey. This index is used to assess the level of client satisfaction while partnering with LatentView. This is a mandatory metric for all L4+.

Please refer the [SDE Metric document](#) to know more about DEL, VoC and CSAT

1. B. Delivery Goals for Horizontal Teams:

Delivery dimension goals are primarily derived from **Value Props/Solution development, Delivery Excellence (DEL Insights), VOE (Survey) and Collaboration (within horizontals)**. The weightages of these sub-dimensions are based on the wing that the resources are part of. Under Horizontals, there are 3 wings at a high level and below are their overview and responsibilities:

- **Expertise:** The resources under Expertise will be available for client billed roles and will have the **Delivery Excellence (DEL Insights)** as a significant factor for them under Delivery goals. Once they move into billed roles, their Delivery will be owned by the respective Entities until the billing closure. The OD and BD will continue to be owned under Horizontals.
- **Value Prop:** The resources under Value Prop will be predominantly focusing on building Value props and their solution development work will play a significant role under Delivery goals.
- **Governance:** The resources under Governance will own the Value prop development and client support as needed. The weightage for them will be a bit less under Delivery compared to their overall BD weightage.

Note: We encourage managers to use these scores as a reference to enhance performance evaluation discussion and rate the employees on the dimension.

- a) **Value Props/Solution development:** The Value prop excellence levels are assigned to every value prop through a business review conducted by the core management team. During this review process, the value props will be assessed based on the ABC metrics including the

activity on sales, branding, and capability among others. This has significant weightage for the resources under Horizontals – Value Prop wing.

- b) **Delivery Excellence (DEL Insights):** The delivery excellence levels are assigned to every deliverable through a business review conducted by the SDE team. During this review process, the SDE classifies the deliverables under different delivery excellence levels as detailed in the **SDE Metric** document. This has significant weightage for the resources under Horizontals – Expertise wing.
- c) **VOE (Survey):** SDE team conducts VoE survey for every six-month (January and July) to get the Entities (Immediate Stakeholder) feedback and understand the pulse of the entities.
- d) **Collaboration (within horizontals):** The teams are expected to collaborate not only within their teams but also are expected to collaborate with different Horizontals to build value props and in GTM activities.

Please refer the [SDE Metric document](#) to know more about DEL, VoC and CSAT

2. Organization Development Goals

Organizational Development dimension assesses the employee's contribution to Org wide initiatives (inter and intra function).

OD goals will be evaluated across these 2 sub- goals based on Gauging Involvement across Ownership, Participation and Skill Development. This could be across multiple organisational development initiatives/ projects such as Thought Leadership, Recruitment support, Employee Engagement (Events, Initiatives and Club activities), CSR initiatives, and SDE activities etc.)

OD Sub- Dimensions
OD Initiatives
Skill Development (Organizational)

OD initiatives rating definition: The OD ratings would be defined by the Number of OD activities an employee participates or owns per cycle (6 months) at a minimum cap of “6” initiatives.

Participation: Participation refers to the contribution by the employees in various organizational initiatives

Ownership: Demonstrate a proactive and engaged approach, actively driving the initiative and taking ownership to ensure its success

Skill Development (Organisational level): Step into the foundation of organizational advancement with Learning and Development metrics. Embedded within our performance management system, they serve as guiding beacons towards heightened skills, productivity, and enduring success. Leading a training program, Getting a professional certification, Bootcamp support.

Employee Level	# Participation Activities	# Ownership Activities	Rating
L1	6+	2+	5
	6	2	4
	5	1	3
	1 to 4	0	2
	0	0	1



1 2 3 4 5 6 7 8 9 10 11 12

L2	4+	4+	5
	4	4	4
	3	3	3
	1 or 2	1 or 2	2
	0	0	1
L3 and L4	2+	6+	5
	2	6	4
	1	5	3
	0	1 to 4	2
	0	0	1

OD Repository (Org / Entity driven):

- 1. Thought Leadership:** Collaborate with stakeholders to create thought leadership such as blogs/case studies/video snippets/infographic etc Practice at an org level (RFP/RFI), meeting with stakeholders
- 2. Industry and Hosted Events:** Evangelize to ensure participation of clients/prospects
Customer Advocacy: Client testimonials/Co-branded content/peer reviews
3. Share knowledge gained in the form of project ideas from the engagement(s) with other teams (Ideas vetted by the Delivery Manager)
4. Lead and participate in employee engagement and club initiatives
5. CSR Specifics of the CSR goals are to be decided by the Volunteer, for example, Field Visit, Curation of Program, Attending Workshop etc. This repository is a guideline for the metrics for evaluation.

3. Business Development Goals

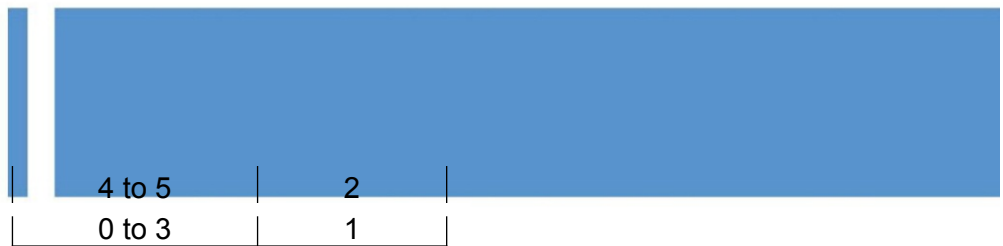
Business Development dimension assesses the employee's contribution towards business growth. (Example: identify the growth opportunities within existing groups, preparing content for proposals, develop PoVs, achieving the Revenue Target, etc.) **BD component will be assessed based on 2 sub-dimensions – Participation & Revenue targets. (Applicable for L1 to L3)**

BD Sub- Dimensions

Participation
Revenue

BD Participation rating definition: The BD ratings would be defined by the Number of BD initiatives an employee participates per cycle (6 months) at a minimum cap of "6" initiatives. Indicative repository defined below:

# BD Initiatives	Rating
8+	5
7 to 8	4
6	3



BD Repository

- 1.Strategic guidance and insights to deal team and support how we bring depth to new prospect conversations.
2. Building decks or technical proof-of-concepts (POVs) that are used in client meeting
Develop compelling and persuasive presentations, sales collateral, and materials that effectively communicate the value proposition of products or services
Creation of case studies, white papers, blog posts, or other content assets that support sales and marketing efforts
- 3.Gathering and mining information about leads, prospects, and their work
Collect data, and analyze competitor activities, identify potential opportunities, and contextualize the capabilities that can be positioned for sales efforts
4. Presenting in client meetings and actively engaging with prospects
Delivering compelling conducting product demonstrations or similar.
5. Identify growth opportunities within Existing Groups/Projects

Revenue Target:

For billed L3+ will be on a target linked performance with their BD dimension rating linked to a revenue achievement, the BD dimension rating would be as below based on achieving the Revenue (Hurdle/Target):

BD Rating	Revenue Achievement
Rating 5	Above Target Revenue
Rating 4	Target Revenue
Rating 3	Hurdle Revenue
Rating 2	80% Hurdle Revenue
Rating 1	< 80% Hurdle Revenue

For those in Governance layer as per RMG records will be on a target-based incentive, and the Revenue/Hurdle will be as defined in their latest revision or offer.

For L3s the BD target will be on a 40% and 60% breakup. 40% of the target number will be taken as target for H1 and 60% will be taken for H2. Example - If 1M is the target and 800k is the hurdle given, 400k will be taken as the target and 320K as hurdle for H1 (Sep cycle) and 600K target and 480K hurdle will be taken for H2 (March cycle).

4. People Management Goal

People Management dimension assesses employees' people management competence. The HR team runs quarterly pulse surveys to collect the feedback from employees about their direct reporting manager. The pulse survey scores will be published for each cycle and managers can use

these scores to assess the employees People Management dimension. These scores are a reference to validate the people management goal accomplishments during the performance appraisal discussion. There are few other goals in the people management repository for discretionary inclusion.

Example: Understanding of individual and organization goals, Inspiration to contribute beyond regular delivery, Recognition, Feedback and Evaluation, Growth, Development and Guidance.

Below are the timelines and calculation metrics of the People Management Score:

- **The Pulse survey will be administered once half yearly. The average of the pulse survey scores (2) for the cycle will be taken**
- Though the survey will be non-anonymous, individual responses will not be disclosed at any level
- Scores will be computed by averaging the responses of all employees reporting to the respective managers
- **For managers who do not have 100% response rate, the rating for the non respondents will be defaulted to "2" and then average score is calculated**
- The average scores across all surveys will be taken to compute the final people management rating score for each manager during their evaluation period
- **Reference Rating Guidelines for People Score**

Rating	Lower Band	Upper Band
5	4.50	5.00
4	4.00	4.49
3	3.00	3.99
2	2.00	2.99
1	0	1.99

Behavioural and Leadership Competencies Dictionary

Behavioural competencies are skill sets that relate to the roles, responsibilities, and knowledge levels of employees. A behavioural competency is any skill, knowledge, ability, or other attribute that an employee needs to perform an element of their job effectively.

To know more [Behavioural and Leadership Competencies](#) please click here.

Organization's Hygiene metrics

Employees are expected to adhere to the organisation's compliance and processes. The chargeability and mandatory course completion are overarching guidelines of the Organization Hygiene metrics and would impact the employees' overall rating based on the manager's discretion.

Organization's Hygiene metrics				
Category	L1	L2	L3	L4+



Chargeability

Chargeability is measured by the billed time of an employee during the appraisal cycle.



The following chargeability guidelines are comprehensive and dictate the rating during performance evaluations. In other words, regardless of an employee's performance in OD/BD, their rating will be capped based on chargeability.

Notes:

1. The chargeability for FY25 is calculated as follows:
Minimum chargeability = ((Days in cycle - Buffer days) * 90%) / Days in cycle
2. The minimum chargeability percentage of an employee is verified against the chargeability percentage in the PRM report
 - a. If the PRM Chargeability Percentage is greater than the Minimum Chargeability Percentage, the Final Rating aligns with the manager's rating.
 - b. If the PRM Chargeability Percentage is less than the Minimum Chargeability Percentage, the Final rating is reduced by 1 score from the manager's rating. For example, if the manager has rated an employee as A, it will be adjusted down to B+
3. The overall rating cap of any employee is based on this irrespective of what.
4. The repository of supporting data will be shared by the HR team prior to the appraisal season and managers are suggested to use the data as reference for evaluating the employee's performance.
5. A failure to complete **mandatory compliance courses** within the given timeline (POSH, Data Security, Anti Bribery, Risk, and Compliance, etc.) or not willing to relocate **onsite post H1B approval** or **PRM fill rate less than 95%** will have an **impact on the incentive payout**.

SDE Data for Appraisal Evaluation:

a) Delivery Excellence Level

DEL Level	Tag	Definition
DEL1	Client Benefits	Deliverable acknowledged by the Immediate Stakeholder/Key Sponsor or equivalent + <u>Quantifiable Benefits</u>
DEL2	Client Outcome	Deliverable acknowledged by the Immediate Stakeholder/Key Sponsor or equivalent + <u>Realized Client outcomes (Client's KPI)</u>

DEL3	Client Impact	Deliverable acknowledged by the Key Sponsor or equivalent + Solution Implemented by client (with evidence) + Realized Business Impact *Additional validation by Rajan & Krishnan
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Note: Based on the above classification, DEL scores are calculated and are mapped at an employee level. The employees respective DEL scores would be given to the managers during the manager evaluation phase (early September and early March). Managers are expected to take this score as a reference for the rating discussions.

DEL Review Process:

“Starting April 2024, the below process will be followed for DEL reviews. Please note this is applicable only for client acknowledgement date on or after April 2024”

Steps	Process
Step1: Prepare the confluence page under respective account space	As and when the team has a client acknowledgement for a deliverable, they are expected to create the confluence page in the respective account space.
Step2: Set up SDE review	Team to send the calendar invite to the SDE team based on mutual availability. Ensure to include the confluence page link in the invite.
Step3: Fill DEL User form for FY24-25	Team should MANDATORILY fill the Google form BEFORE the SDE review.
Step4: DEL finalization	At the end of the review, SDE team will update the DEL level (DEL1/DEL2/DEL3) in the back-end file, which will reflect in the DEL Insights tracker in real-time
Step5: Employee-level DEL	Employee-level insight count will be auto-populated in the DEL Insights tracker in real-time

Note:

1. It is **MANDATORY** to fill the Google form (for each deliverable) & create confluence page (for each deliverable) **BEFORE** the review, else the review will be cancelled
2. Teams are expected to present the insight to the SDE team within 1 month from the date of client acknowledgement. Non-compliance to the above timeline will not be entertained (insight will not be considered).
3. DELOs will no longer a part of SDE reviews. Teams to maintain a DELO tracker internally for simple client appreciations.

Approach for DEL Score (based on DEL1, DEL2 & DEL3):

1. Number of DEL1, DEL2 & DEL3 for the appraisal time period is considered

- Weights are assigned to different DEL (**50% for DEL3, 40% for DEL2 & 10% for DEL1**) for levels L1 to L3 and the corresponding Weighted DEL numbers are calculated
- Weights are assigned to different DEL (**75% for DEL3, 25% for DEL2**) for levels L4+ and the corresponding Weighted DEL numbers are calculated
- DEL score (on a scale of 1-5, 5 being the highest) will be calculated at an employee-level by standardizing the weighted DEL numbers

Weighted DEL count calculation: (Weighted DEL1 x 0.1 + Weighted DEL2 x 0.4 + Weighted DEL3 x 0.5)

DEL score on a scale of 1-5 is calculated by standardizing the weighted DEL count

Example:

Emp Id	Level	Onsite/Offshore	Cluster	Client	CPRJ	DEL0	DEL1	DEL2	DEL3	Total	Weighted DEL1	Weighted DEL2	Weighted DEL3	Total	Score
Emp1	L1	Onsite	Retail	Client 1	CPRJ1	1	7	3	1	11	0.7	1.2	0.5	2.4	5
Emp2	L2	Offshore	Retail	Client 2	CPRJ2	0	4	2	0	6	0.4	0.8	0	1.2	4
Emp3	L3	Offshore	Consumer	Client 3	CPRJ3	0	5	0	3	8	0.5	0	1.5	2	5
Emp4	L1	Offshore	Financial Services	Client 4	CPRJ4	0	2	2	1	5	0.2	0.8	0.5	1.5	5
Emp5	L2	Offshore	TG-NW	Client 5	CPRJ5	0	7	3	1	11	0.7	1.2	0.5	2.4	5
Emp6	L1	Offshore	Europe	Client 6	CPRJ6	0	3	0	0	3	0.3	0	0	0.3	3
Emp7	L1	Offshore	Consumer	Client 7	CPRJ7	0	7	3	1	11	0.7	1.2	0.5	2.4	5
Emp8	L3	Onsite	TG-NW	Client 8	CPRJ8	7	16	0	0	16	1.6	0	0	1.6	5
Emp9	L3	Onsite	TG-Cali	Client 9	CPRJ9	2	11	1	0	12	1.1	0.4	0	1.5	5
Emp10	L4	Offshore	Industrials	Client 10	CPRJ10	0	7	1	0	8	0.7	0.4	0	1.1	4

b) Voice of Customer (VoC)

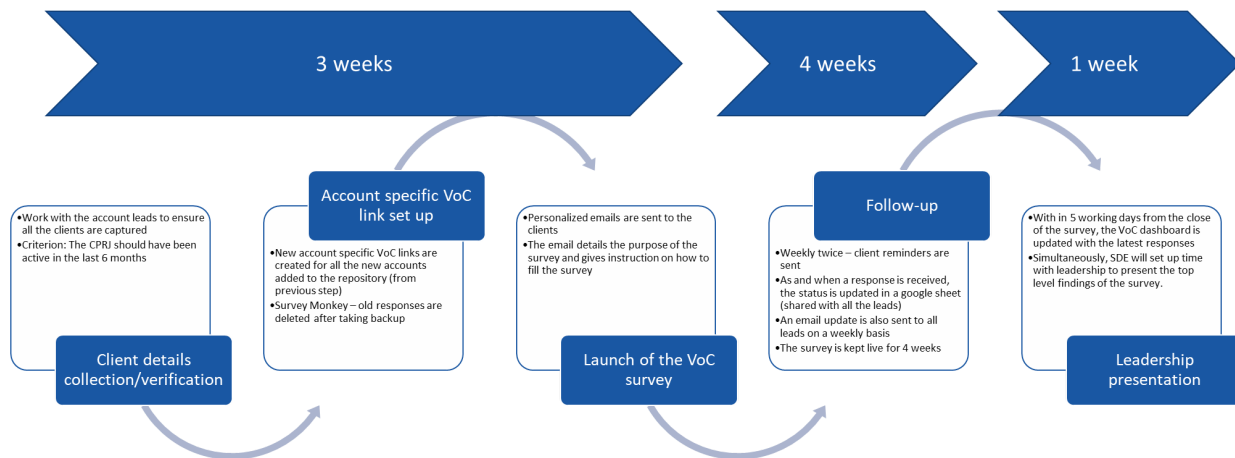
VOC Metrics

The client responses that are captured at a CPRJ/Project level are mapped at an employee level. The employees respective VoC metrics would be given to the managers during the manager evaluation phase (early September and early March). Managers are expected to take this as a reference for the rating discussions.

The client responses from the VoC survey will be considered to evaluate the below Goals:

Level	VOC Metrics	Recommended Score
L1 & L2	Delivery - Quality	A composite metric created by combining the above VoC metrics. VoC Score is calculated by standardizing this composite metric on a scale of 1 to 5 (5 being the highest)
	Business Context	
	Project Requirements	
	Approach to Problem Solving	
L3 & L4+	Team Satisfaction Index	
	Recommendation Index	
	Quality Index	
	Cross Pollination	
	Actionable Insights	
	Tangible Benefits	
	Project Management	

VoC Survey Process



VoC Example:

Emp Id	Level	Onsite/Off shore	Cluster	Client	CPRJ	CSAT	Recommendation Index	Team Satisfaction Index	Quality Index	Project Management	Cross pollination	Total	Standardized Total	Score
Emp1	L1	Onsite	Retail	Client 1	CPRJ1	100	100	100	100	5	5	410	1.28	4
Emp2	L2	Offshore	Retail	Client 2	CPRJ2	80	80	80	80	4	4	328	0.65	4
Emp3	L3	Offshore	Consumer	Client 3	CPRJ3	90	90	90	90	3	3	366	0.94	4
Emp4	L1	Offshore	Financial Services	Client 4	CPRJ4	60	60	60	60	2	2	244	0.00	3
Emp5	L2	Offshore	TG-NW	Client 5	CPRJ5	20	20	20	20	1	1	82	-1.25	1
Emp6	L1	Offshore	Europe	Client 6	CPRJ6	75	75	75	75	4	4	308	0.49	3
Emp7	L1	Offshore	Consumer	Client 7	CPRJ7	90	90	90	90	3	3	366	0.94	4
Emp8	L3	Onsite	TG-NW	Client 8	CPRJ8	20	20	20	20	2	2	84	-1.23	1
Emp9	L3	Onsite	TG-Cali	Client 9	CPRJ9	20	20	20	20	1	1	82	-1.25	1
Emp10	L4	Offshore	Industrials	Client 10	CPRJ10	40	40	40	40	5	5	170	-0.57	1

b) Customer Satisfaction Score (CSAT)

CSAT index is derived from the VoC survey. This index is used to assess the level of client satisfaction while partnering with LatentView and is a organization mandate metric to be achieved at 90% for L4+.

Based on the client rating (on a scale of 1 to 5), CSAT index is calculated which will be in a range of 0 to 100

CSAT The client responses that are captured at a CPRJ/Project level are mapped at an employee level. The employees respective CSAT index would be given to the managers during the manager evaluation phase (early September and early March). Managers are expected to take this as a reference for the rating discussions.

Maternity and Sabbatical Leave – Not Rated Concept

Why – A default rating could imply a fall or increase in performance (for example for a TT or CP). Rating an employee who has not worked for that period is misleading.

Who – An employee who has worked less than 3 months in the cycle will be ‘not rated’.

Employees who have worked for 3 months or more in the cycle will be rated and it will be an absolute rating (HR team to work with the managers and close the performance process before employees go on leave).

For increment and incentive– The last cycle's rating (actual cycle worked in LatentView) of the employee will be considered.

For employees on sabbatical, the incentive will be calculated only for the number of days worked that year.

For employees on maternity, any leave without pay days will not be considered as a part of the incentive calculation.

Effect on promotion

The promotion will be based on the minimum promotion eligibility criteria, and we will treat this on a case-to-case basis considering potential and previous performance.

Maternity and Sabbatical Leave – Not Rated Concept (Biannual Cycle)

1st Cycle of “not rated”:

An employee who has **worked for less than 3 months in the cycle will not be evaluated** and would be given a default rating based on their previous rating as given below:

1. If an employee has received a rating which is “B+ and above” in the previous cycle, then the employee's not the rated cycle would default to a “B+” rating
2. If an employee has received a rating which is “**B and below**” in the previous cycle, then the employee's not the rated cycle would default to a “**B**” rating

Employees who have worked for 3 months or more in the cycle will be evaluated and rated and included in the evaluation process.

2nd Cycle of “not rated”:

We would recommend the employee to be given a “**B**” rating and the rating is subjected to change based on managers inputs/suggestion and can be decided on a case-to-case basis.

Maternity and Sabbatical Leave – Not Rated Concept - (Annual Cycle)

1st Cycle of “not rated”:

An employee who has worked for less **than 6 months in the cycle** will not be evaluated and would be given a default rating based on their previous rating as given below:

- 1.If an employee has received a rating which is “**B+ and above**” in the previous cycle, then the employee's not the rated cycle would default to a “**B+**” rating
- 2.If an employee has received a rating which is “**B and below**” in the previous cycle, then the employee's not the rated cycle would default to a “**B**” rating

Employees who have worked for **6 months or more in the cycle will be evaluated** and rated and included in the evaluation process.

2nd Cycle of “not rated”:

We would recommend the employee to be given a “B” rating and the rating is subjected to change based on managers inputs/suggestion and can be decided on a case-to-case basis.

Revision List

Revision No.	Effective Date	Document Release/ Revision Date	Revision Description	Rationale for change	Change type(add/modify/delete)	Document/ Process/Policy Revision
3.0	21- May- 2024	21- May- 2024	Weightage Standardization Addition of Parameters and definition of sub-goals OD and BD Metrics		Modify	Process Revision
2.0	06-Oct-2023	06-Oct-2023	Second Release	NA	Modify	Process Revision
1.0	19-May-2023	19-May-2023	First Release	NA	NA	NA