CEO Memo

Our company has two separate systems for managing our Human Resources Department and our Payroll department. Every time I ask for information about our employees, it takes both departments a significant amount of time to gather the information that I need. In addition, our shareholders often ask for information about our employees and both departments have to stop their work to gather the information to answer their questions. It seems very inefficient to me and I feel limited in the kinds of information that I can ask for. Therefore, I am not able to make timely management decisions.

Another problem that my management team faces is that we often discover a problem before it is too late. Ideally, we would like the systems to let us know when certain conditions exist or special events take place, such as employment anniversaries. Neither system provides us with the ability to manage by exception.

Our company is growing very quickly so our need to provide timely information to our senior managers is becoming critical. We would like your team to develop a dashboard that can be used by senior managers to show summary information about our employees and their payroll and benefits information. Although we are considering changing to a different financial system or Human Resource Management system, we would like to explore the possibility of continuing with our existing systems for a while longer.

The team should develop an application that shows the following summarized information:

1) The total earnings by shareholder, gender, ethnicity, part-time, and full- time employee to date and the previous year, by department
2) Total number of vacation days taken by shareholder, gender, ethnicity, part-time, and full-time employee to date and the previous year
3) Average benefits paid to shareholders and non-shareholders to date by benefits plan

In addition, management would like to be able to set alerts when the following conditions occur:

1) An employee is within a certain number of days of their hiring anniversary
2) An employee has accumulated more than a certain number of days of vacation
3) Employees make a change to their benefits plan that affects their payroll
4) All employees who have birthdays within the current month

I am sure that we will have more information needs in the future, but this will address our most pressing needs. In addition to the summary information, senior managers must be able to "drill down" into the summary information to see specifics. The dashboard should have that capability to see the details behind the summary. Please provide a plan to accomplish the work. It would also be helpful to see some drafts of the interface so that we can make sure the team is on track with our needs.

CEO