

# CONVEY

## SUCCEEDING WITH DIRECT CONNECT

Lets look at how ORANGE COMPANY used DIRECT CONNECT (first just the parent account and then Branch Manager) to connect to the CONVEY Databank.

### BACKGROUND

ORANGE COMPANY operates from a single location and employs 32 members of staff all of whom answer to the same manager.

ORANGE COMPANY had never created records for their employees but needed a way to record annual performance reviews and several other reports. With no existing processes in place, DIRECT CONNECT seemed to meet their limited requirements.

After creating their CONVEY account ORANGE COMPANY started by adding their employees to their DIRECT CONNECT 'employee list', followed by a quick evaluation of the default record templates, this resulted in them deciding to use 2 of the default record templates as well as creating one of their own.

ORANGE COMPANY employed one person to handle all of their HR tasks so that one person was given the responsibility of managing the companies CONVEY account, creating the employees records, and performing searches of the CONVEY Databank to screen new applicants.

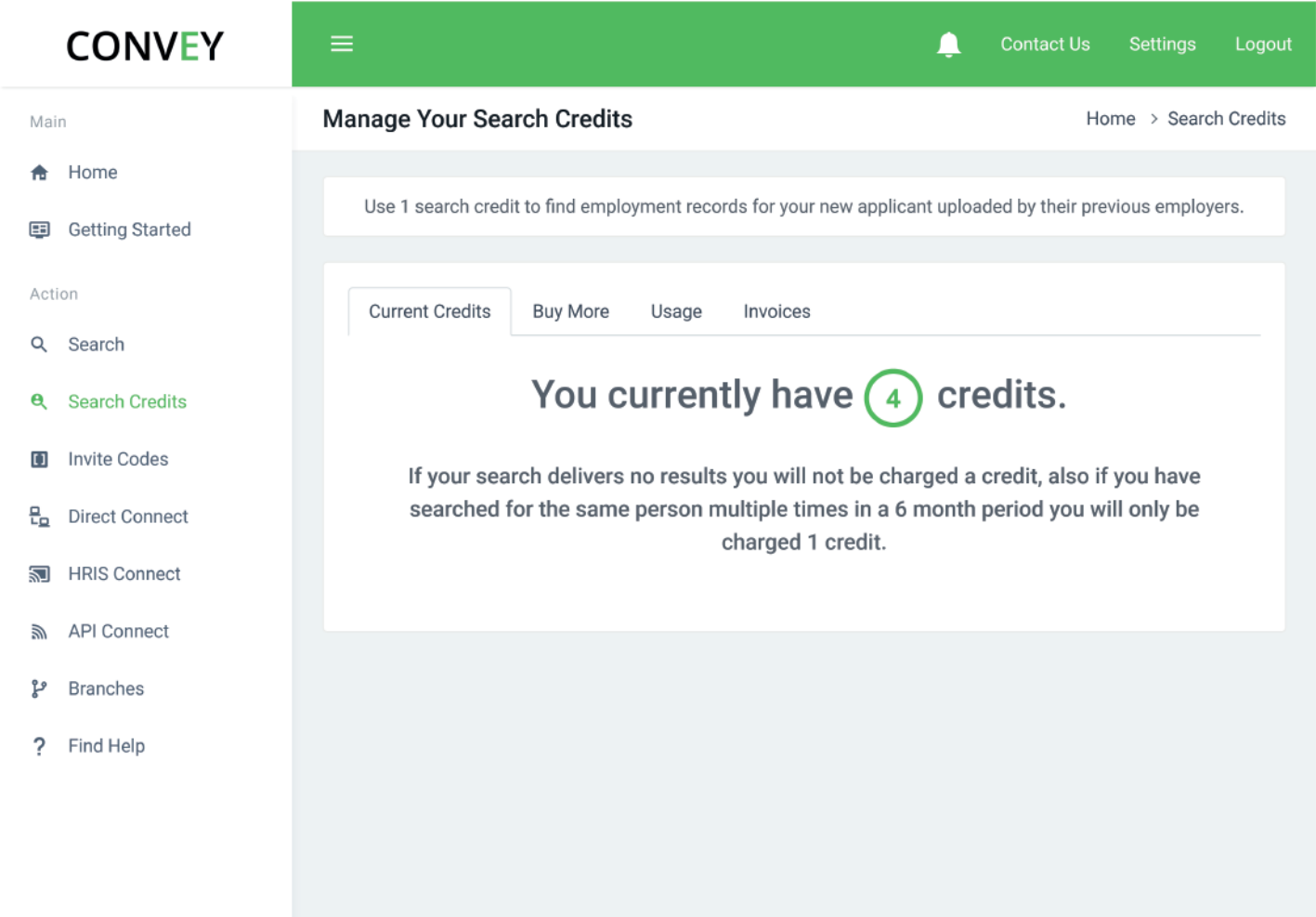


After 12 months ORANGE COMPANY expanded to a 2nd location and the existing team was split into two. A manager was appointed in both locations and each manager was given the responsibility of recruiting new team members at their respective locations, to assist their new managers ORANGE COMPANY activated BRANCH MANAGER and created two separate branch accounts, each branch account gave their managers the ability to screen new applicants with each account sharing a pool of search credits which the main HR manager oversaw from the parent account.

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As both teams grew in size the managers in both locations became more accountable and were assigned the responsibility of conducting reviews and creating records in order to conduct performance reviews for their individual teams.

To make this possible ORANGE COMPANY activate ‘branch level DIRECT CONNECT’. This expanded the features in each branch account so that the managers in each location could add employees within their branch accounts and create records for their teams at branch level. The templates created within the parent account became visible in each of the branch accounts enabling the branch managers to share them and create records as and when needed. Those default templates that were not needed were hidden so they became invisible in the branch accounts making the process much clearer.



A Quantum Leap Forward...