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2020 Mid-Year Check-In

Review Period 1/1/2020 - 6/30/2020

REVIEWER

Christopher Legros (Manager), Craig Labulis (Manager - Co-Planner), Valerie Rainey (Indirect Manager), Christopher Legros (Indirect Manager - Co-Planner), Stephanie Sansone (HR Business Partner)

Ryan Klauder

Decision Supp Analyst III
Job Code

Overview

Task Instructions

The mid-year performance review provides an opportunity for managers and employees to reflect on performance over the first half of the year and engage in discussion around where things have been going well and where opportunities for further development and improvement exist.

The review is intended to be brief but insightful to fuel thoughtful evaluation of performance from January 1, 2020 through June 30, 2020. Please follow each of the steps listed below providing thoughtful reflection while keeping comments brief and to the point.

Mid-Year Performance Review

Directions

Please answer the questions below. This section is intended to be a summary of performance over the first half of the year. It is recommended that answers be brief but thoughtful to provide the framework for the mid-year performance review discussion

What accomplishments have you achieved during the first half of the year? Provide specific examples and be sure to include outcomes.

Comments

Ryan Klauder (Self):

- iRIS - I volunteered to help be the Decision Support liaison and product owner for iRIS with ISS earlier this year, which was outside of my scope of work. I saw this as an urgent strategic project that would enable Decision Support, Data Governance and the Operations teams to unlock analytical capabilities across many different systems. I recognized the need for a dedicated team resource to this effort and took steps to support and move the project forward. Since I became the product owner, I have facilitated the execution on an ambitious scope of work for the 30-60-90 day deliverables that aligned to the projects original deliverables timeline. I worked with the Decision Support team, Finance, ISS, Accounting, iNSIGHTS, and Talent to define requirements, deliverables and timelines. We moved from direct connections to multiple data sources in Tableau to direct connection to a single data source with expansive data sets. We have upwards of sixty tables we can tap into across 6 data sources (SFDC, Ultipro, iNSIGHTS, Netsuite, OneDrive, LinkedIn). The result has truly changed how the business operates. Dashboards have been more straightforward as all SFDC fields are now available in iRIS (no more clunky, complex formulas), load times have decreased for dashboards (from tens of minutes to seconds), and correlating multiple data sets is now possible in a single data source connection. An added value is being able to utilize Custom SQL within Tableau using SSMS, reducing our time to delivery. Additionally I've been piloting Point-in-time reporting which has been a request from the business for over two years that finally has a viable path forward.
- Sales Information Center - As an urgent and last minute request, I was asked to support Sales with a one-stop-shop of all Sales related deliverables. Within the day I was able to create a Sharepoint site that lists all of the deliverables,

owners, status, delivery frequency, links and more. This proof of concept has been where Sales Leadership now goes to get all of their information around data, metrics and deliverables. I then rolled this out to Sales Operations, Sales Leadership and Decision Support where it was received well and is now being proofed to roll out to the rest of the organization.

- Talent Dashboards - the end of 2019 I started to automate a lot of the Talent dashboards, however this was really finalized in a repeatable, scalable process at 2020Q1. The results of this is a quicker time to delivery for month-end and quarterly metrics in a single, self-serving dashboard. The result is faster and more accurate data being delivered to business owners, that is also partitioned to provide the right data to the right users. Since integrating the Finance and Talent views together, I've implemented User Filters so that there is a single space for collaboration between the two teams, ensuring they are seeing the same data at the same time. Ultimately, this automation has enabled me to work on other projects for the rest of the G&A functions (captured below with New Dashboards and Analytics). Additionally, I recreated the Performance Review Dashboard in January and enabled it to be more automated and scalable. The changes and improvements were warmly received by Talent Management, especially Laura Coccaro. This enabled us to do more reporting at executive levels for Performance Reviews.
- Process Improvements - I've facilitated long-term strategic process improvements for the Position Path, Vista Groupings and Levels (1, 2, 3 for staff vs management) to be incorporated into Ultipro. This will ensure that the organization has a scalable method of capturing crucial people analytics data moving forward to foster a lean organizational structure. Additionally, I've facilitated various data quality issues relating to location, salary, and employment type which supports our international expansion. Additionally, my automation of the LMS Dashboard, ServiceAide Tickets, Accounting Monthly Headcount, ApplicantsPerReq have enabled me to take on new requests captured below.
- New Dashboards and Analytics:
  - Legal Funnel - I was able to build out a dashboard for Courtney and Neal around SpringCM workflow data, which has helped them better understand process bottlenecks around Order Forms and data quality issues within SpringCM. Courtney and Jenn have been very excited about this analysis because it gives them better insights into workflow durations and where contracts are spending a significant amount of time. The result is more pointed process improvements for data quality and automation around Order Forms.
  - Deal Desk Analysis - Working closely with Karen Friedenberg and Mike Pastore, I built out a Deal Desk dashboard that is a single, self-serving view around our quotes and deals. This has helped Karen identify SFDC process improvement opportunities to reduce the amount of deals going to CRO which directly impacts the number of deals we are able to produce. Additionally, I've created KPI and Scorecard views that show how we are doing relative to target and trends YTD. The result has been a better understanding of our deals, changes in our approval levels and deal conditions. We are on target with improving our subscription terms, discount % and deals going to the CRO level.
  - Conversions - I was asked to reimagine and recreate a Conversion Cohort dashboard. I extensively worked on building this out in SSMS knowing it was the most scalable method of doing so. After building out the source of truth in SSMS, I then built out the views in Tableau for Sales Operations, showing conversion rates through the funnel both from a count and dollar perspective. The results have been well received, with Mike Pastore commenting this is one of his highest priority asks for the past two years. The dashboard is being shared with the rest of Sales Leadership to make meaningful impact in our sales stage process, to understand how to convert more opportunities through the funnel and increase revenue.
  - New Business Stage Before Closing - This was an urgent request that I executed on in SSMS to build out a method to quickly obtain the opportunity stage before closing and better understand the conversion of

opportunities before they are Closed Won/Closed Lost. This helped Sales Operations as well as Marketing Operations understand where to focus efforts to reduce the amount of Closed Lost opportunities.

- Deal Walk Point-in-Time - I built out a concept for Point-In-Time reporting from iRIS. While in its initial stages, it proves that we can do accurate point-in-time reporting for various metrics in a scalable, automated method. The results have not been highlighted yet, however this will improve productivity as it will eventually replace the manual process we currently do. This also enables us to look at data overtime and trend week over week, month over month, and quarter over quarter.
- Days Bills Outstanding (DBO) - After a conversation with Valerie regarding DBO, I immediately went to work with Mike Wong and Tara Koenig for doing a DBO analysis. This has become a monthly deliverable that has helped Accounting understand target areas of the business with late payment performance as well as the average payment cycle time by payment terms. The initial ground work for this will be useful and helpful when we start to correlate SFDC and Netsuite data to have better customer insights and a 360 view of lead to cash. This has helped Tara prioritize work on a monthly basis for the rest of the Accounts Receivable team and have a tailored, historical understanding of payment cycle time which leads to receiving more invoices.
- Information Security Metrics - I was able to create a single source for all of InfoSec's dashboards, with better analytics into Phishing failures by tenure, level (eg Staff, Management, Director, etc), and organization units. This has resulted in more pointed improvements for target areas to improve our phishing performance. Additionally, I've created dashboards around Vendor Risk and Ticketing performance to help better prioritize work and understand capacity issues within the team.

Craig Labulis (Manager - Co-Planner):

Ryan has done an excellent job working with ISS to communicate reporting requirements as well as collaborating on timelines and expectations. The operationalization of iRIS was very successful and Decision Support is now able to fully incorporate iRIS connections into our dashboards. In addition to iRIS, Ryan was able to create a Sales Information Center by using the Decision Support SharePoint as well as several key dashboards within sales when extra support was needed.

Reporting across G&A has always been dominated by Talent without as much of a focus on Legal and Information Security. Due to Ryan's automation of nearly all aspects of Talent reporting, there has now been an expanded focus on General Counsel insights which has been long awaited by the business.

In what areas do you feel you can continue to develop/improve?

Comments

Ryan Klauder (Self):
- Influence - Outside of G&A (Accounting, Finance, Talent and Legal), I do not have too much exposure to the other areas of the business (Sales, Services and Labs). I'd like to build a relationship with the Labs organization because my experience with iRIS, iCIMS In-house and Ultipro could be useful in product management as I have some key business use-cases for new features and integrations.
- Technical - I can continue to refine my SQL knowledge and I'd like to start learning Python as that language will be very important for the future of Decision Support, Business Intelligence and data analysis moving forward.
- Strategy - As Decision Support, our team could be imbedded in strategic-level conversations so that we can have a more holistic view of the organization and it's moving parts. By ways of influence, relationships and networks - our team could influence discussions to help share data-driven perspectives. This will also help us manage expectations

with what is currently possible and what will be possible in future-states.

- Simplicity - Since this is an initiative by Steve, our team can be champions of process standardization and data simplicity. Decision Support can work with the business operations teams to convey complexities or nuances with the systems we work with that the operations teams can then put on a roadmap to fix or simplify. This will help us manage the expectations of the business but also (in the long-term) reduce our time to delivery for reports and analysis. As our team, the organization and our locations expand, we will have system and data entropy. An added value is a shorter experience curve for new members.

Craig Labulis (Manager - Co-Planner):
Ryan should continue to expand his knowledge of various salesforce objects. Being as well-rounded as possible across as many systems as possible will help streamline his efforts to further communicate iRIS needs.

There is also opportunity for Ryan to be more flexible in his approach to ad hoc requests. It should be kept in his mind that following a strict intake process/meeting cadences and project management best practices are not always required for each and every request that comes in from the business.

What are some actions you have taken throughout the first half of the year to drive your professional development?

Comments

Ryan Klauder (Self):
- iRIS - I volunteered for this project because I saw it as a high value-add and essential to our team to improve productivity. For my short career at iCIMS, it was an opportunity to quickly learn about all of the systems, their integrations, and knowledge-bases that can be leveraged as an SME. We encountered multiple scope changes and some last minute requests but overall the project has been very successful. Being the product owner/champion for this project helped demonstrate my bias to take initiative, leadership capabilities and ability to drive deliverables.
- Expand Scope of Work - I've sought out and delivered scopes of work outside of G&A to help a network, establish my brand and learn more about the business. I was eager to help Sales and Operations (Karen) because this would give me a much better understanding of the rest of the organization and support making an impact.
- SSMS - I've started to work with SSMS again after a few years. This has enabled me to leverage these skills to help build out some of the Point-in-Time concepts, Stage Before Closing, Conversions and support other dashboard developments. I will look to continue to refine my SQL skills as these are important now that we have iRIS, in addition to learning Python.

Craig Labulis (Manager - Co-Planner):
Ryan is always looking to expand his knowledge to be able to tackle any new challenge that comes his way. Taking on his role as the product owner of iRIS has helped him greatly in this regard. Ramping up during his first full year at iCIMS has been very successful due to his inclination to constantly better himself.

Sign Off & Comments

Directions

Please sign off.

X Ryan Klauder
Self

X Chris Legros
Manager

8/26/2020
Date

8/26/2020
Date

X Chris Legros
2nd Level Manager

X Stephanie Sansone
HR Business Partner

8/13/2020
Date

8/19/2020
Date

Comments

Ryan Klauder (Self):

With a lot of changes the first half of this year and normalizing remote work, we have continually been able to deliver and make an impact to the business. I look forward to continuing to provide value and innovating how we operate.

Key Strengths and Focus Areas

Key Strengths

Comments

Craig Labulis (Manager - Co-Planner):

Process improvement, automation, accountability, technical acumen, business-partnering, passion, drive, customer commitment.

Key Focus Areas

Comments

Craig Labulis (Manager - Co-Planner):

I would like Ryan to expand his knowledge of the various systems used within iCIMS as well as to continue his role advocating iRIS functionality for Decision Support.

Trending Rating

Directions

The Manager should provide a trending rating which reflects how the employee is progressing for 2020. This is meant to

frame the conversation with the employee to understand whether or not they are on track. Managers: please select from the drop down the status that reflects current trending performance rating.

Please click on the question mark below to see the Mid-Year Review rating definitions.

Rating Scale

Rating	Description
Exceeding Expectations	Consistently meeting expectations and delivered significant and noteworthy results in SOME aspects of job responsibility. Contributions have a considerable impact on the Team/Department/Organization's goals (as applicable to the position level). Demonstrating initiative/extra effort towards many goals. Demonstrating excellence in most competencies and skills for the position.
Meeting Expectations	Delivering effective and reliable results in all areas of job responsibility. Positively contributing to the team's goals. Demonstrating initiative/extra effort towards some goals. Demonstrated proficiency in most competencies and the skills required for the position.
Sometimes Meeting Expectations	Delivering inconsistent results in some areas of job responsibility. Improvement is needed to bring performance to the level of contribution required for the role. Requires development that may include the benefit of experience, training and/or coaching with regard to achieving results and/or demonstrating proficiencies in competencies.

What is the employee's trending rating for Mid-year 2019?

Reviewer	Rating
Craig Labulis (Manager - Co-Planner)	Exceeding Expectations

Summary

Overall Rating

2020 Mid-Year Check-In
Ryan Klauder

Exceeds Expectations

Manager delivers review to employeee

Directions

Once you are ready to have the performance discussion with your team member, please sign off on the final review which will release the soft copy review to your direct report.

X Craig Labulis
Manager

8/26/2020
Date