True North – Next Generation

**Primary Functionality:**

True North Objectives System

Annual Strategic Plan – Property/Department

Performance Management

PurViews (Job Descriptions)

ReViews (Performance Reviews)

360 ReViews (Results Populate Management Reviews)

Calendar – Outlook Integration (Appointment/Task/Both)

Forms Management (PDF Forms)

Template Storage (PurViews, ReViews, 360’s)

Customized Template Storage (Customized Available to Other Properties)

Meeting Minutes Template

Completed Meeting Minutes Forms Storage

Strategic Sales Plan Template

Completed Strategic Sales Plan Storage

Required File Naming Conventions (position – property – date)

eMail and Print Capabilities

Mobile Application

Video Tutorial for System Administration

**Administrative Levels:**

Stand-alone Property Log-ins [no need for multi-property]

SuperUser (Globi)

Administration (GM, HR) – See All

Division Director – See All or All by Division

Department Manager – See All, All by Division, or by Department

Supervisor – See All Departments, or only own Department

Associate – See All Department Associates, or See Self

**Settings:**

Self-Administration with Video Tutorial

Associate Database Upload Capability (Name, Date of Hire, Date and Amount of Last Increase, Bonus Plan, Title, Wage, Review Type)

True North Objectives – Category Set-up

**Reports:**

Report Card of KSF Completion

Report Card of ReView status

Review List (Name, Title, Wage, Review Type, Results Score, Culture Score, Comment Box)

Results-Culture Matrix (with Filters)

**Main Screen**

The new system will have a Home Screen that changes depending on the Administration level of the User.

**Administration** will have five quintiles including True North Objectives/Calendar, Annual Strategic Plan – Property/Department, Performance Management, Forms Management, and System Administration

**Division Director**, **Department Manager**, and **Supervisor** will have access to True North Objectives/Calendar, Annual Strategic Plan – Property/Department, Performance Management, and Forms Management

**Associate** will have access to True North Objectives/Calendar, Annual Strategic Plan - Department

**True North Objectives**

This aspect of the system will function in a very similar manor to the current True North Objectives system.

* Improvements need to be made to the time stamping functionality. In the current program, an auto-completion date is entered for the current date and must be changed to reflect an actual completion date.
* Improvements need to be made to the print functionality to repeat headers on multiple pages.
* Email capability
* Mobile application - no
* NB: In the new system we would like to be able to insert an icon in the comments section that links the True North Objective to either a Meeting Minutes Form or a Strategic Sales Plan Form. Clicking on the icon should take the user to the Form that has both eMail and Print functionality.

**Annual Strategic Plan – Property/Department**

This aspect of this system will function in very similar manor to the current Annual Strategic Plan system.

* The new system should accommodate both a property-wide Annual Strategic Plan and departmental Annual Strategic Plans.
* The ability to see the property-wide Annual Strategic Plan and specific departmental Strategic Plans should follow administrative rights.
* Commitments made on the Annual Strategic Plan for the property and on departmental plans should populate on a personal calendar and integrate with Outlook as an appointment, task or both.
* When mousing-over the commitment on the Calendar, a larger bubble should appear with complete details of the commitment.

**Performance Management**

This aspect of this system will function in a very similar manor to the current Performance Management system.

* Administrator and Division Directors should have the ability to customize template forms for PurViews and ReViews.
* Administrator should have the ability to launch the 360 ReView process through Outlook eMail with an embedded link to the 360 ReView form. The 360 ReView form will populate the 360 feedback section of the Management ReView forms.
* Associate Database Upload Capability (Name, Date of Hire, Date and Amount of Last Increase, Bonus Plan, Title, Wage, Review Type)
* ReView tracking form should have eMail and Print capability

**Calendar**

This aspect of this system will function in a very similar manor to the current Calendar system.

* Property and Departmental Commitments will have the ability to download an appointment, task or both to Outlook.
* A check box for Annual Property Strategic Plan, Department Strategic Plan, and True North Objectives will allow filtering of Calendar content.
* Automatic ReView date reminders built off of the final review date for the ReViews: Preparation, Send Review, Self Review for Management, Submit Self Review, Schedule Manager Review, Finalize Review, Submit Completed Review, 90 Days Post Review follow-up on required actions items. Appointment, task or both.

**Forms Management**

This will be a new addition to the True North system and serve a key document repository for PurViews, ReViews, and 360 Review forms.

* Administrator and Division Directors should have the ability to customize template forms for PurViews and ReViews. The repository should include folders for the following:
  + Northview Standard Templates
  + Property Customized Templates
  + Company-wide Customized Templates
* Administrator should be able to launch the 360 Review process through eMail distribution with an embedded link.