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Session #3B

Talent Management Made Easy - Featuring Halogen Software



Sage Abra Users Conference





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Introduction



Frank Hagel, President of Hagel & Company



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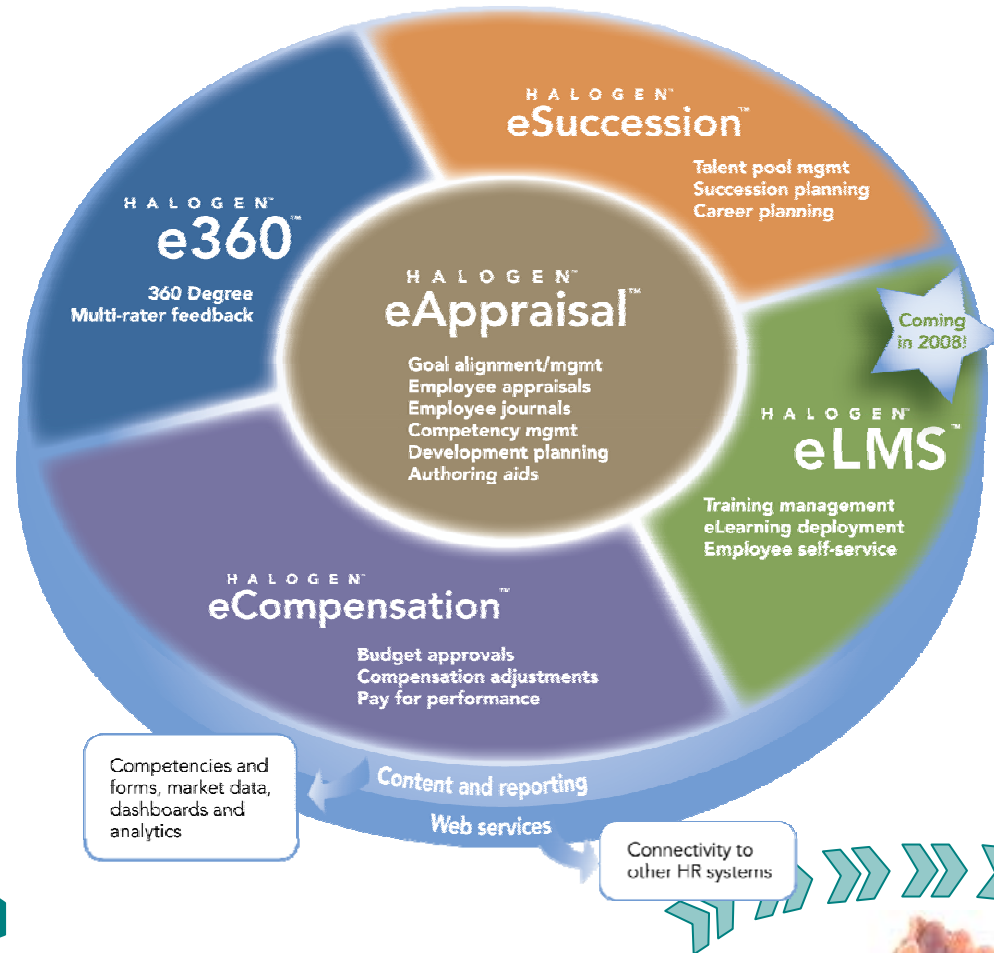


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Halogen Software – the Complete Solution



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Complete Performance *Development*

The screenshot displays the HALOGEN SOFTWARE web application interface. At the top, there is a navigation bar with links for Home, Help, Logout, and Contact. Below this, the user is logged in as Vincent Hopper, with a 'My Direct Reports' link. The main content area is divided into several sections:

- My Performance:** Includes links for Goals, Development Plan, Performance Journal, Past Appraisals, Past Talent Assessments, Compensation History, Profile, and Documents.
- eAppraisal:** Features 'General Reports' (Competency Rating Report) and 'Process Reports' (Process Status). It shows a table for '2009 Performance Appraisals' with columns for 'Due Date' and 'Step Name'. A task is listed: '2009/06/30 Complete appraisals for your direct reports'. A summary indicates: 'Tasks that require your attention', 'Tasks that are past due', and 'Tasks that are completed'.
- eSuccession:** Includes 'General Reports' (Development Plan Report).
- eCompensation:** Includes 'General Reports' (Compensation Adjustment).
- eLearning Manager:** Includes 'General Reports' (Training Report).
- Useful Links:** A section at the bottom for additional resources.
- Activity Tracker:** A sidebar on the right showing a list of activities categorized by level (Mine, 1st Level, 2nd Level). It includes sections for Goals (e.g., 'Implement CRM Software'), Learning Activities (e.g., 'Lean Techniques'), Performance Journals (e.g., 'Closed Stevenson deal'), Self-Appraisals (e.g., '2009 Performance Appraisals'), and Multi-rater Evaluations (e.g., '2009 Performance Appraisals').



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Halogen eAppraisal with e360° Multi-rater

- Goal alignment
- Employee appraisals
- Complete 360 feedback
 - Employee journals
- Competency management
 - Development planning
 - Authoring aids



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Talent Profiles

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HALOGEN SOFTWARE Talent Management Suite

Help | About | Logout

eAppraisal eSuccession eCompensation eLearning Manager User Center Options

User Center > User List

Options

- User List
- Group List
- Import Users
- Custom Labels
- Role Assignment
- Talent Profile Access**
- Import Documents
- Automatic User Update
- Employee Development History

Talent Profile Access Inactive

Note: This feature grants access to employee talent profiles outside of the standard relationship access.
 Click on this icon to view additional information.

Access to Talent Profiles Outside of Own Hierarchy

	Talent Profile Section Access					Employee Access	
	Secure User Center Info	Secure pre-defined & custom sections	Past appraisal section		Succession section	Edit Rights	Selected Groups/Employees
			Score	Competency Score			
All Managers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	-all employees- edit..
All HR Representatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A	groups edit..

Selected User Access to Talent Profiles

Add User

	Talent Profile Section Access					Employee Access	
	Secure User Center Info	Secure pre-defined & custom sections	Past appraisal section		Succession section	Edit Rights	Selected Groups/Employees
			Score	Competency Score			
X Mackay, Dawn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-all employees- edit..
X Morin, Jennifer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	groups edit..
X Orhun, Ufuk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-all employees- edit..
X Scott, Deanna	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-all employees- edit..



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Talent Profiles – Defined by the Customer

- Organizations can customize fields and track things that are unique to their business, e.g.,
 - Pet Food Company: What pets do employees have...?
 - Non-profit: What volunteer activities are employees engaged in...?

Andrew Hilton
Auditor
ahilton@dunrite.com
Profile Completeness: 100%
Last Updated 2009/06/25

Direct Manager: Marc Miron
Department: Finance
Location: New York
Hire Date: 2006/03/13 (3 years 3 months)
HR Representative: Chantal Roberge

Additional Information

Past Appraisals

Appraisal Process	Overall Score	Completed Date
2008 Performance Appraisals	4.3/5.0	2009/06/25

Education

Institution	Type of Institution	Degree/Diploma Obtained	Program of Study	From	To
Columbia	University	Masters	Business	1996	2001
New York University	University	Bachelors	Arts	1993	1997

Language Skills

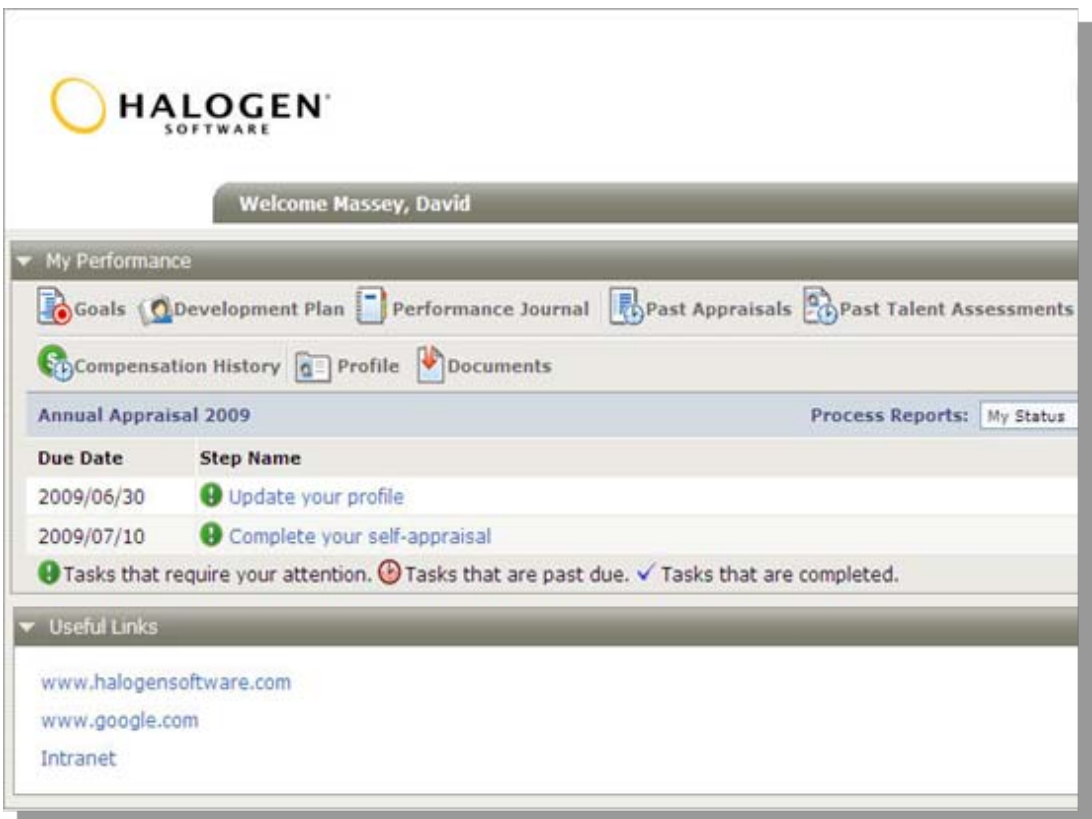
Language	Speaking Proficiency	Reading Proficiency	Writing Proficiency
Spanish	Fluent	Fluent	Intermediate





Workflow Drives Adoption

- Halogen solves the user adoption and completion problem - provides workflow and reminders around profile completion and upkeep
 - Part of an HR controlled process
 - Automated reminders
 - % complete reports available to managers/HR



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Searching, Connecting, Collaborating

- Searching
 - Simple Web Like Searching (standard)
 - or highly advanced to narrow results
- Results can be
 - Saved
 - Reported on via simple export
 - Compared to Others
- HR, Managers, Recruiters etc..
 - Have more rich and actionable talent information with intuitive searches
- Peers can
 - Search, Connect and Collaborate based on what's important to them

Home | Help | Logout | Co
Employee Directory
Profile Search

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Profile Search - Compare

Select Compare Data

	Andrew Hilton	Simon Hu	Jennifer Slater
Query Match	31%	31%	
Profile Completeness	100%	75%	

Basic Information

	Marc Mason	Marc Mason	Marc Mason
Direct Manager	Marc Mason	Marc Mason	Marc Mason
Job Title	Auditor	Product Manager	Project Manager
Department	Finance	Marketing	IT
Email Address	ahilton@quinte.com	shu@quinte.com	jslater@quinte.com
Last Updated	2009/06/25	2009/06/25	2009/06/25
Location	New York		
Hire Date	2006/03/13 (3 years 3 months)	2006/09/11 (2 years 9 months)	2006/05/01 (3 years 1 months)
HR Representative	Chantal Robozec	Chantal Robozec	Jenny Acosta

Additional Information

Past Appraisals Overall Score

	4.3/5.0 (2009/06/25)	4.2/5.0 (2009/06/25)	4.4/5.0 (2009/06/25)
2008 Performance Appraisals	4.3/5.0 (2009/06/25)	4.2/5.0 (2009/06/25)	4.4/5.0 (2009/06/25)

Education

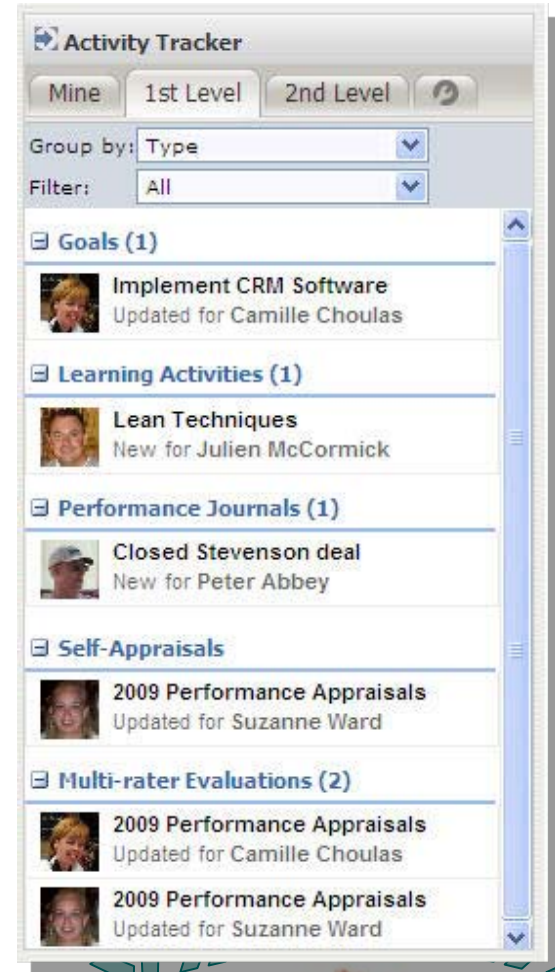
	Columbia	Korea University	Seattle U
Institution	Columbia	Korea University	Seattle U
Type of Institution	University	University	University
Degree/Diploma Obtained	Masters	Doctorate	Bachelors
Program of Study	Business	Comparative Literature	Computer Science
From	1995	2002	1999
To	2001	2006	2003
Institution	New York University		
Type of Institution	University		
Degree/Diploma Obtained	Bachelors		
Program of Study	Arts		





Activity Tracker – Is Your Company Brilliant at Talent Management?

- First and only feature of its kind
- Designed in response to a real business use issue:
 - What are employees and managers actually doing with regard to Talent Management? Are they doing the right things?
 - Managers and employees see real-time TM activity relevant to them e.g.,
 - Updates to Goals Development plans, learning and journal notes
 - Instantly drill down for details.
 - Uses familiar “network update” feature from consumer social networking (Facebook, Linked-In)





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Manager's Dashboard

Dashboard
 ▶ Display Options

Process Status

Completed Steps
 In Step
 Specific Step

View: Manager Writes Employee Apprais...

Step	Count
Employee Writes Self	24
HR Rep Approves Sel	6
Manager Writes Empl	16
Second Level Manage	10
Manager Meets With	14
Employee Adds Final	4
HR Rep Sign-Off	3

Score Distribution

View: CS3 - Senior Programmer

[Score Report](#)

Scoring scale	2006 Annual Performance	2005 Annual Performance
0.0	0	0
0.5	0	0
1.0	0	0
1.5	0	0
2.0	0	0
2.5	0	0
3.0	0	0
3.5	0	0
4.0	0	0
4.5	0	0
5.0	0	0

Competency Scores

View: CS3 - Senior Programmer

View: Top 10 [Score Report](#)

Competency	2006 Annual Performance	2005 Annual Performance
Motivating Team	4.5	4.5
Ensures Proper...	4.5	4.5
Encouraging Sk...	4.5	4.5
Defining Roles...	4.5	4.5
Conflict Resol...	4.5	4.5
Building Team...	4.5	4.5
Customer Focus	4.5	4.5
Interpersonal...	4.5	4.5
Leadership...	4.5	4.5
Communication	4.5	4.5

Goal Status

[Goal Report](#)

Category	Not Started	On Track	At Risk	Not on Track
Finance & resources	525	89	76	0
Learning & growth	500	235	35	0
Products & Services	435	125	25	0
Professional Services	565	265	125	0

Status
 Not Started
 On Track
 At Risk
 Not on Track





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Halogen eSuccession™

- Talent pool management
- Succession planning
- Career planning

High Potential Report

Selection Grid

Use the checkboxes on the grid to hide/show high potential candidates

	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1-High Potential
Promotion Potential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2-Promotable
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3-Well Qualified

Exec Talent

	Score	Target
Overall	4.1/5.0	4.3
Communication	4.0/5.0	5.0
Leadership	5.0/5.0	4.5
Delegation	3.5/5.0	4.0
Integrity & Ethics	3.5/5.0	4.0

Find Successor Report

Level	Last Appraisal Score	Pool Score / 5.0	Gap	Degree
Director	3.8/5.0	4.8	+6%	College
Manager	4.8/5.0	4.5	0%	Ph. D
CPA	4.2/5.0	4.4	-2%	MBA



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Halogen eCompensation™

- True merit pay
- Pay tightly integrated with performance
- Complete budget process
- Compensation adjustments



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eCompensation Budget

Assign Values

Exclude / Include

Budget					6.0%	\$15,250.00			
Summary		\$252,500.00	5.5%	\$13,917.00	6.0%	\$15,130.00	\$267,630.00		
[-] Base Salary									
◆ Name	Effective Date	◆ Score	◆ Current	Rec %Inc	Rec Increase	%Inc	Increase	◆ New	Compa-ratio
Hilton, Andrew	2007/01/01	4.5/5.0	\$92,000.00	5.5%	\$5,060.00	6.5%	\$6,000.00	\$98,000.00	93.3%
Owens, Debbie	2007/01/01	4.2/5.0	\$47,000.00	5.2%	\$2,444.00	6.0%	\$2,820.00	\$49,820.00	111.1%
Stauback, Carolyn	2007/01/01	2.9/5.0	\$61,500.00	6.2%	\$3,813.00	5.2%	\$3,190.00	\$64,690.00	102.8%
Dow, Alex	2007/01/01	3.8/5.0	\$52,000.00	5.0%	\$2600.00	6.0%	\$3,120.00	\$55,120.00	107.2%

Sub Departments - Summary

Approve

Send Back to Author

Budget					5.8%	\$76,840.00		
Summary		\$1,317,851.50	5.6%	\$73,950.18	5.8%	\$76,840.00	\$1,394,691.50	
[-] Base Salary								
Name	Current	Rec %Inc	Rec Increase	%Inc	Increase	New		
<input checked="" type="checkbox"/> Dow, Alex Group	\$449,520.00	5.9%	\$26,521.68	5.8%	\$26,200.00	\$475,720.00		
Hilton, Andrew Group	\$382,044.00	5.1%	\$19,328.50	5.9%	\$22,540.00	\$404,584.00		
<input checked="" type="checkbox"/> Stauback, Carolyn Group	\$486,287.50	5.8%	\$28,100.00	5.8%	\$28,100.00	\$514,387.50		

- Tasks that require your attention
- Tasks that are past due
- Approved
- Notes to Review
- Create an Annotation
- Annotations viewed
- Annotations to review



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Halogen eLMS™

- Training management
- Employee self-service
- eLMS learning deployment
- Link training to development plans



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Manufacturing Edition!

(Being announced in 4-6 weeks).

- Unique features solve TM requirements for manufacturing vertical around Quality and Compliance (LEAN, Six Sigma, ISO), On boarding (30, 60, 90 day reviews), and workforce characteristics (access to technology etc..)
- Complete with LEAN and Manufacturing Specific Competency Libraries
- Shipping in September



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Substantial ROI

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Customer	Employees	Savings
	2500	\$300,000 annually
	2200	\$50,000 first year
	600	\$100,000 annually
	200	\$48,000 annually



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Thank you!



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