# A Brief Introduction to Occupatos, a „beyond 360°" performance evaluation system

## 1.    Background and mission

*Although SMEs have a substantial role to drive European economy, development of tools which provide innovative support of internal corporate processes, having an overview of organisation and management areas, making processes measurable more manageable was somehow neglected.This new SPM (Special Performance Management) system was created after a thorough, in-depth research to give a detailed and realistic report about their actual status and challenges.*

*Using these new examination methods, the application effectively manages the input data and results.*

### Functions and objectives

- Administration of employee data.
- Link and data transfer between Occupatos and existing HR system of the organisation
- Job descriptions, tracking changes
- Visualisation of the real organisation strukcture (organogram) of the organisation, based on the above data
- Creation, management and evaluation of performance review campaigns, tailored to the performance evaluation expectations of the organisation.
- Creating functions to support HR experts and management, based on collected data of the application.
- Creation of a communication tool (Webfarm), where Occupatos can be supported without any supervisor tasks of the subscribers.Performance of the system is scalable.

The application gives an opportunity to all stakeholders (employees, HR experts, managers and company owners) to contribute to a transparent, clear, coherent evaluation, based on unified and straightforward rules.

The system also offers an opportunity to measure client satisfaction.

## 2.   Brief introduction to OCCUPATOS

### Overview

- The subscriber uses OCCUPATOS as a cloud service, using his own database, separated from any data of other subscibers.However, the system can manage a number of organisations within one subsription.

    **Advantage:** Only one code table shall be maintained, as HR specialists work in one application, but all corporate data is managed separately.Employees working in more than one organisation units in a corporate group can easily be administered with adequate job descriptions and performance reviews.

- The system manages both positions and job descriptions.
- **Main roles:** HR specialist, corporate manager, person administering KPI data, system administrator, employee
- Subscribers have the opportunity to use the application in any foreign language.System functions and messages are already available in English while there is an opportunity to add further language options.There is also a possibility to translate the content of code repositories, which is the subscriber's responsibility.The purpose of this function to make the application available for foreign owners of companies operating in Hungary or either adding their subsidiaries based in other countries.
- The application tracks back data of employees and organisational units.
- The application serves information requests of various functions from data already recorded.

    The database is mostly builds bottom-up, data of individuals build the system structure, using data inputs of individual job holders and organisation units, including unique or uniform job descriptions and various positions.

    Competence and KPI data can be assigned to a certain job description, which means that this information is also linked/assigned to the actual employee having that particular job description.

## Create job descriptions module

- The role of the module is to store the necessary data for employee job descriptions, and create these job descriptions according to the regulatory regime of the actual organisation.
- If the organisation has an HR application, then there is an option to elaborate an interface to take employee data from this HR system.
- If there is no HR application or it is not possible to import data, then base data shall be recorded in OCCUPATOS.
- Every company can elaborate a competence and KPI system of their organisation, which then will be used to create job descriptions and to manage performance reviews.
- To ensure transparency, the application can uniform job descriptions, however, individual differences can also be attached to this uniform job description.

# Organisation units and organisation structure

- A subscription can contain an organisation or a group of organisations (companies).Within a group (if they are linked together) or the individual company all levels can be viewed and managed, from smaller units down to the individual's level.
- The structure can be visualised and he graphic organogram can be printed.
- Employee and job decsription data also have a feature of „validity period".Changes within the organisation can be easily tracked and managed, viewing the history of the actual period.

# Performance review

During the pre-defined performance review campaigns employees can have a 360 degree evaluation (self evaluation, manager evaluates employee and employee evaluates manager, employees reviewing each other).All involved parties (except from self-evaluation) give anonymous replies, to give an objective picture.

There is an opportunity to involve external partners or clients in the review process, which also gives an opportunity to measure client satisfaction.An external view about the organisation can be more realistic and a well designed form can help to find challenges and weaknesses while can also highlight strengths and values.

The application can manage competences, KPIs (targets and facts), expectations based on job descriptions and individual objectives of a certain period.

Another novelty is to manage performance of project teams, using project targets and hierarchy within the project group, which may be different from the general structure or basic job description.

**Performance review reports**

- Reports are made usign various aspects of the work performance.
- Performance review of employee up to 360° + external evaluation
- Performance review of staff on probation period
- Summary report of employee questionaires shows the following data: Minimum, maxium, averaga, median and deviation..
- Summarises and analyses the answers to questions.
- Comparison between employee's performance to the campaign average (in percentages)

**Notifications**

To support HR specialist work, the application sends a range of notifications:
- Notification prior to the end of the probation period,
- Notification about the beginning of a performance review campaign.
- Notification about an approaching date of employment termination.
- Notification about return of staff members in passive status
- Campaign notification/reminder
- Notifies if a manager modifies the job description of an employee
- All personal involved in a campaign get a notification mail about the beginning of an evaluation campaign, then they also receive a reminder in e-mail if they forego to fill in the evaluation forms they have to and the campaign is coming to an end.
- External stakeholders/evaluators can access the application/evaluation forms via a link received in the notification e-mail.

Text of notifications can be edited (no limits) by HR professionals.A test e-mail supports the planning process.
Timing of notifications can be set (number of days before the actual event or deadline) individually, depending on the type of notifications.

# 3.    Support of HR specialists

- The system can generate lists, to create reports about recorded data of employees, which can be viewed on screen or can be exported into Excel.
- Notification about the end of probation period
  The applicaion sends a notification, prior to the end of probation period (the number of days before the actual date can be defined by the user) to start performance review, then prepare for the necessary administration processes..
- Notification about the date of termination of employment
  One day before the termination date the application sends a reminder to prepare all necessary documentation to officially complete termination.
- The appliation also has a list of employees in passive status, they are not encountered in the number of workforce during this period.
- Notification about employees finishing their passive period returning to work
  After notification the process can be launched which prepares for the return of the employee currently in passive status
- Having „validity period" in a number of definitions (job descriptions, positions etc) can help to prepare any change in organisation structure.Job descriptions can also be created as drafts, while they also can have various versions for different periods.
- The job description templates can be exported to support and automate other processes from job advertisements to ISO documentation.

# 4.    Opportunities of different roles

## HR professional/administrator
- Manages employee data and other necessary data
- Creates organisation structure .
- Elaborates job description templates and creates individual job descriptions
- Creates and manages performance review campaigns
  Can participate in performance review process either as an employee or as a colleague
  **Person administrating KPI targets and factual data**
- Receives notifications and uses speficically defined datasets and lists
- Receives dedicated mails and notifications
- Can view notifications of the review process and do review tasks using the link received in the notification e-mail

## Member of Management
- Can view his/her own data and job description(s)
- Can create a new job description for employees line managed, with a drafting funcion
- Can participate in performance review process either as an employee or as a manager .
- Can view performance review reports (about himself/herself as well as subordinates)
- Can browse/view data of subordinates
- Can view notifications of the review process and do review tasks using the link received in the notification e-mail

**Employee**
- Can view his/her own data and job description(s)
- Can participate in performance review process either as a reviewed employee or a contributing party
- Can read notifications of performance review campaign and can contribute to evaluation using the link in the notification leading to the actual form