

# **ACTION MANAGEMENT SYSTEM**

## **OPERATIONAL REPORTS GUIDE**

"An Improvement System  
that fits every Business"

**The AMS Internet System**

The Management Practice  
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# Business Associates Network Pty Ltd

## AMS-C REPORTS & SELECTION OPTIONS

Dated: 5<sup>th</sup> November 2006



REPORT TITLE	Report Description	Included in AMS as Standard Report	Optional Reports Selection (\$300/report)
<b>STRATEGIC BUSINESS REPORT</b>	This report summarises the Business 5x5 Strategy by grouping the Level-1 (5) Actions and Level-2 (25 ) Actions together with their respective descriptive strategies and producing a 30-Section summary document that consolidates and articulates the overall vision and direction of the business.	Yes	N.A.
<b>BUSINESS DNA SUMMARY REPORT</b>	This report is an expansion of the Strategic Business Report to include all 125 Operational Actions (Level-3 Actions) that underpin the 25 Strategic Business Actions. This report therefore provides a cascading description of the entire Business DNA with individual descriptions of all operational actions. No risk analysis or accountability references are included in this report as it is simply a descriptive summary of the major operational processes of the business.	No	[ ]
<b>IMPROVEMENT AUDIT REPORT</b>	This report is a consolidated summary of the output from an Improvement Audit that is typically done in a "workshop" environment. Fourteen (14) questions are posed and answered in detail in connection with a specific operational area (typically one of the Level-3 Actions) followed by a recommendation of the actions that have been agreed to address the issues uncovered in the Audit. In essence this report becomes the formal outcome of an Improvement Audit meeting/workshop conducted by the business.	Yes	N.A.
<b>PROJECT SUMMARY REPORT</b>	This report summarises a single Improvement Project listing all of Project Actions that are included within an Improvement Project being undertaken by the business. Projects with up to twenty (20) actions are summarised in a Gantt Chart as well as a Project Action list. Larger projects with 20+ actions are reported only by a Project Action List. The report lists Project Actions, Who is Accountable, Start Date of each Project Action, End Date, and Status of each Action.	Yes	N.A.
<b>PROJECT OVERDUE ACTIONS REPORT</b>	This is a report that can be generated on any single Improvement Project and produces a list of all Project Actions that are overdue as of the date that the report is run. This report is intended as a "progress check" that can be done on any project by any user at any time. The report lists Project Actions, Who is Accountable, Start Date of each Project Action, End Date, and Status of each Action.	Yes	N.A.



# Business Associates Network Pty Ltd

## AMS-C REPORTS & SELECTION OPTIONS

Dated: 5<sup>th</sup> November 2006



REPORT TITLE	Report Description	Included in AMS as Standard Report	Optional Reports Selection (\$300/report)
<p><b>ALL PROJECTS OVERDUE ACTIONS REPORT</b></p>	<p>This is a report is generated to cover multiple Improvement Projects and produces a list of all Project Actions that are overdue as of the report date on all Projects currently active within AMS. This report is intended as a summary for management as a "progress check" that can be automatically generated by AMS and emailed to selected managers on a predetermined and scheduled basis. The report lists all Improvement Projects together with all overdue Project Actions, Who is Accountable, Start Date of each Project Action, End Date, and Status of each Action.</p>	<p>No</p>	<p>[ ]</p>
<p><b>INCIDENT ITEM DETAILS &amp; STATUS REPORT</b></p>	<p>This report is simply a "hard copy" of the status of any single incident at a point in time. This is a simple method of outputting the progress details of a recorded incident for review, filing, or to complement any paper-based Quality Systems and procedures that may already be in place within a business. Full details of all Incident information within AMS, including the Rectification steps taken, are all printed.</p>	<p>Yes</p>	<p>N.A.</p>
<p><b>OPEN INCIDENTS LOG</b></p>	<p>This report is a list of all Incidents recorded by the business and not yet "closed" or resolved. This report includes all incidents that are currently open as of the date that the report is run. Incidents are grouped by "Incident Category" and then ordered by "Due Date" within each category. Line items also include Date Raised, Incident Cause/Description, Action-ID area to which they belong, Person assigned to Resolve, Person who Initiated, and Status.</p>	<p>No</p>	<p>[ ]</p>
<p><b>INCIDENT OVERDUE REPORT</b></p>	<p>This report is a list of all Overdue Incidents recorded by the business that are past their "Due Date" as of the date of running this report. Incidents are grouped by "Incident Category" and then ordered by "Due Date" within each category. Line items also include Date Raised, Incident Cause/Description, Action-ID area to which they belong, Person assigned to Resolve, Person who Initiated, and Status.</p>	<p>No</p>	<p>[ ]</p>
<p><b>ANNUAL APPRAISAL CALENDAR</b></p>	<p>This report can be produced by any manager or supervisor who has staff reporting to them. Each employee has an annual appraisal date included within their staff record in AMS as part of their employment information. An employee normally expects to be formally reviewed on each anniversary of their appraisal date. This is a hieratical report that lists up to three levels of employees reporting to the manager/supervisor who runs the report. This report is used as a planning document by managers.</p>	<p>No</p>	<p>[ ]</p>



<b>REPORT TITLE</b>	<b>Report Description</b>	<b>Included in AMS as Standard Report</b>	<b>Optional Reports Selection (\$300/report)</b>
<b>PERFORMANCE APPRAISAL</b>	This report is a "worksheet" for a performance appraisal and is available for generation by any manager or supervisor for any employees who reports to them. The report shows the detail of their measures, targets, and performance history for all 25 Job Actions of their Job 5x5. A blank "Review" area is provided under each history data box where the notes from the current performance review can be written for later entry into the employees Job 5x5 record.	No	[ ]
<b>30-DAY JOB ACTION REVIEW PLANNER</b>	This report identifies all of the Job Action reviews that are scheduled to occur on a direct subordinate in the next 30-days. It can be printed by any manager or supervisor for any employees who reports <u>directly</u> to them. The report includes the Job Actions of only employees who report directly to the manager, and shows the Job 5x5 Actions that are due for review in the sequence of those Review Dates. This report improves review planning by all managers and supervisors.	Yes	N.A.

# Strategic Business Report

DemoCompany Pty Ltd

## 1 Grow New Business and Departments

Our strategy for growing our new business is primarily through business partners. These business partners will be selected based on their need to add more value to their client's businesses. The products and services provided by our Business Partners will therefore be complementary to ours.

A marketing agreement will exist between us and each business partner that will give each business partner the right to license our systems to their clients. License Revenue earned from our system via a business partner will be shared by us and our business partner.

It will be possible for a client to sign up for our services directly with us but this will only be possible via our Internet Website and support will only be provided online through email or electronic conferencing workshops.

### 1.1 Develop Marketing Strategy

All opportunities (marketing, product, or any other) must be thoroughly researched with a financial business case and proposed via the marketing department. All opportunity proposals must also have a sponsoring line manager who supports and seconds the defined initiative.

### 1.2 Reach our Buyers

Our strategy in market reach must be low cost and based on the leverage of Internet partners. Our own websites must therefore be of a high quality that promotes our image of an online service provider and complements the image of our partners.

### 1.3 Feed the CRM

Managing our client interaction and information is vital to our ongoing viability as a company. The more information that we hold about our client's satisfaction with our systems then the more likely it is that we can sell them additional systems. It is therefore an essential requirement for all sales and services personnel to continually update the CRM system with memo notes of all activity.

### 1.4 Progress New Client Tactics

New clients are primarily obtained by using our existing clients as references. Penetration into new client areas should therefore be constructed around firms within the same industries as existing clients. References should therefore highlight the specific benefits gained by the industry.

### 1.5 Measure Results from Client Base

New business obtained from existing clients should be a minimum of 25% of annual revenue. Sales reports must be prepared on a monthly basis to track new orders from our client base.

## 2 Develop Cool Software

All of our software should always incorporate the latest concepts in systems design.

### 2.1 Research Rapid Development Methods

To achieve the highest productivity of our programmers is our constant goal. Keeping in touch with the latest XRAD tools is essential if we are to operate a cost-effective development shop and keep our prices keen for our clients.

### 2.2 Design Intuitive Applications

The traditional view is "user friendly" applications, however we need to be more advanced in our thinking and stretch the user paradime to "intuitive".

# Business DNA Summary Report

DemoCompany Pty Ltd

## 1 Grow New Business and Departments

Our strategy for growing our new business is primarily through business partners. These business partners will be selected based on their need to add more value to their client's businesses. The products and services provided by our Business Partners will therefore be complementary to ours.

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### 1.1 Develop Marketing Strategy

All opportunities (marketing, product, or any other) must be thoroughly researched with a financial business case and proposed via the marketing department. All opportunity proposals must also have a sponsoring line manager who supports and seconds the defined initiative.

1.11 Investigate new markets & products

This is why the risk is now high

1.12 Create, revise & implement marketing plans

Currently no written marketing plan exists in any form.

1.13 Expand existing markets & products

1.14 Manage marketing consultants/projects

Develop a case study at the completion of each project. Obtain a reference from the client prior to completing the project.  
Ask for 3 referrals from the client prior to completing the project

1.15 Provide marketing statistics

### 1.2 Reach our Buyers

Our strategy in market reach must be low cost and based on the leverage of Internet partners. Our own websites must therefore be of a high quality that promotes our image of an online service provider and complements the image of our partners.

1.21 Maintain web site

1.22 Promote company image

1.23 Network with industry groups

1.24 Publish company newsletter

## Improvement Audit Report

Action ID: 1.11 *Investigate new markets & products*

Question #	Question
1	<p><i>In what business does the item add value?</i></p> <p><b>Answer</b></p> <p>The credibility of the Marketing Plan and the inherent forecasts depend on this Action. It is impossible to justify any marketing or revenue forecasts without this intelligence.</p>
2	<p><i>What value does it add?</i></p> <p><b>Answer</b></p> <p>(a) Competitive differentiation of products and services. (b) Improvement in our Net Profit by new product introduction.  </p>
3	<p><i>What could go wrong?</i></p> <p><b>Answer</b></p> <p>Out of date knowledge of our competitor's strategies so that we should be investigating markets other markets that will retain our competitiveness.</p>
4	<p><i>How likely is that?</i></p> <p><b>Answer</b></p> <p>Difficult to quantify in \$ terms before completing the investigation, so the real value will be determined by the forecasts that evolve from market analysis. Unless the incremental profit forecast is greater than \$100k per year then entry into this market would not be justified.  </p>
5	<p><i>What could be done to mitigate that risk?</i></p> <p><b>Answer</b></p> <p>(a) Retain external specialist researches. (b) Expand our marketing staff. (c) Recruit a researcher from our competition.</p>
6	<p><i>Are there procedures to follow? What?</i></p> <p><b>Answer</b></p> <p>Staff must define the scope of the investigation and determine all desired outcomes so that the resources employed are utilised productively.</p>
7	<p><i>Are there forms to be filled in? What?</i></p> <p><b>Answer</b></p> <p>No standard method currently exists within the Company, however there are New Market Rearch guidelines provided by the Direct Marketing Association and these should be used to develop the scope of this Action.  </p>
8	<p><i>Is there information the operator should know? If there was</i></p> <p><b>Answer</b></p> <p>We need to know more about existing products in the target market segment.  </p>

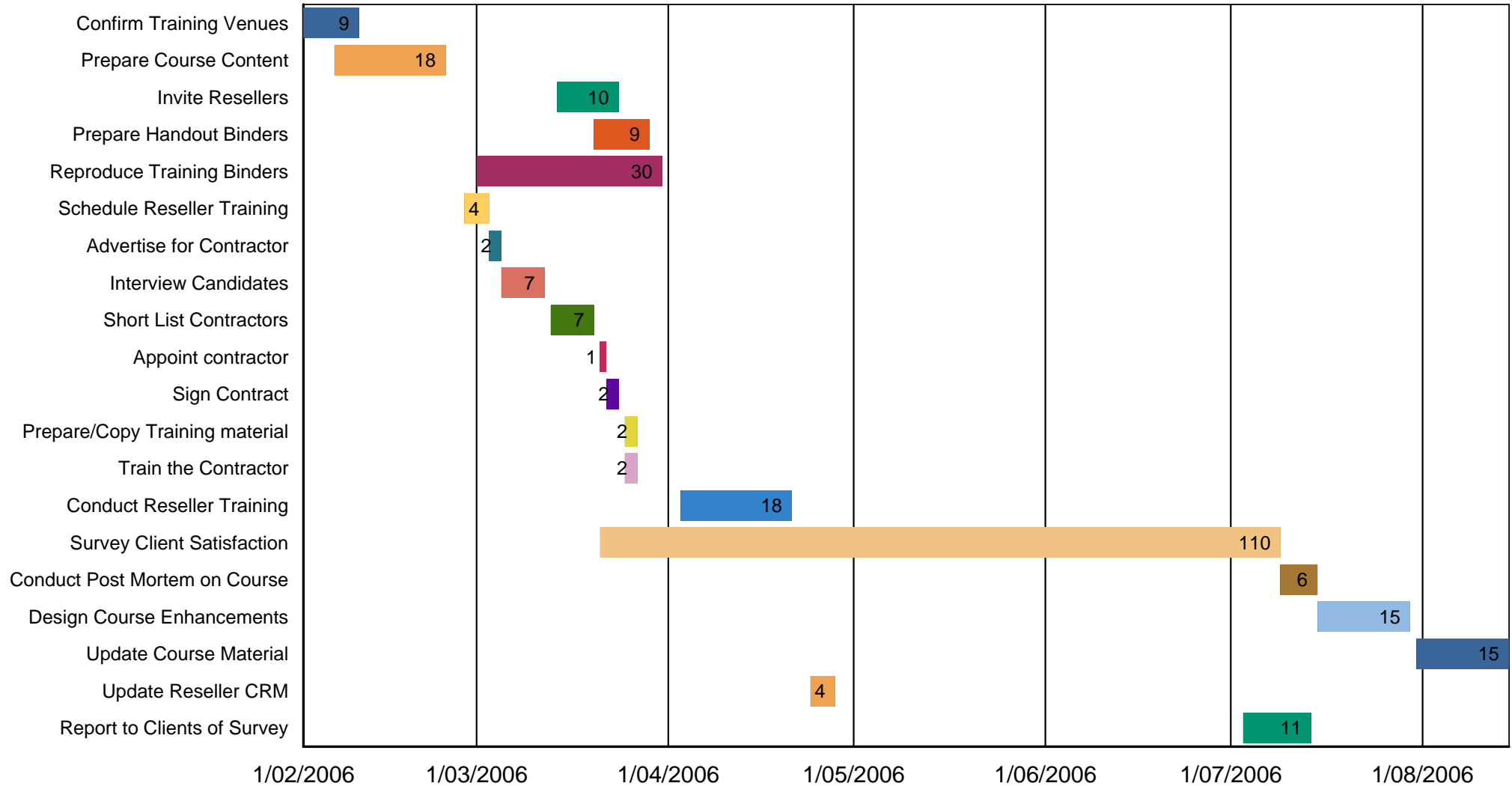
<b>Question #</b>	<b>Question</b>	<b>Answer</b>
9	<i>How is the performance to be measured?</i>	Performance should be measured in terms of approved new products and projected incremental net profit improvements.
10	<i>What is the target measure?</i>	Incremental net profit forecast >\$100K
11	<i>What is the current performance like?</i>	Unacceptable. No new market research has been carried out by the company since formation.
12	<i>How could it be improved?</i>	A higher level of focus by senior management of the importance of market research is critical to the on-going success of this Action.
13	<i>What does the action cost?</i>	This will depend on the scope defined but an Internal Rate of Return of 20% must be achieved in 12 months.
14	<i>How long does it take to do?</i>	The final report must be available within 3 months from approved commencement of the project.
15	<i>What are the recommendations?</i>	Define the scope of a special research product and assign a recommended budget for approval.



Date: 4/11/2006  
 Time: 1:06:36PM  
 User: rb.1  
 Company: DemoCompany  
 Project-ID: BIP01

## Project Summary Report

Project Name: Marketing Improvement Project



Date: **4/11/2006**  
 Time: **1:06:36PM**  
 User: **rb.1**  
 Company: **DemoCompany**  
 Project-ID: **BIP01**

## Project Summary Report

**Project Name:** Marketing Improvement Project

Item Order	Project Action	Who to do	Start Date	End Date	Status
001.00	Confirm Training Venues	Mary Guest	1/02/2006	10/02/2006	Complete
002.00	Prepare Course Content	Richard Burley	6/02/2006	24/02/2006	Complete
003.00	Invite Resellers	Blake Wilson	14/03/2006	24/03/2006	Complete
004.00	Prepare Handout Binders	Richard Burley	20/03/2006	29/03/2006	Complete
005.00	Reproduce Training Binders	Richard Burley	1/03/2006	31/03/2006	Complete
006.00	Schedule Reseller Training	John Troughton	27/02/2006	3/03/2006	Complete
007.00	Advertise for Contractor	John Walker	3/03/2006	5/03/2006	Scheduled
008.00	Interview Candidates	John Smith	5/03/2006	12/03/2006	Scheduled
009.00	Short List Contractors	Richard Burley	13/03/2006	20/03/2006	Scheduled
010.00	Appoint contractor	Richard Burley	21/03/2006	22/03/2006	Scheduled
011.00	Sign Contract	Richard Burley	22/03/2006	24/03/2006	Scheduled
012.00	Prepare/Copy Training material	John Walker	25/03/2006	27/03/2006	Scheduled
013.00	Train the Contractor	Richard Burley	25/03/2006	27/03/2006	Scheduled
014.00	Conduct Reseller Training	John Troughton	3/04/2006	21/04/2006	Scheduled
015.00	Survey Client Satisfaction	John Troughton	21/03/2006	9/07/2006	In Progress
016.00	Conduct Post Mortem on Course	John Smith	9/07/2006	15/07/2006	Scheduled
017.00	Design Course Enhancements	Richard Burley	15/07/2006	30/07/2006	Scheduled
017.50	Update Course Material	Richard Burley	31/07/2006	15/08/2006	Scheduled
018.00	Update Reseller CRM	Andrew Leap	24/04/2006	28/04/2006	To Be Scheduled
019.00	Report to Clients of Survey	Andrew Leap	3/07/2006	14/07/2006	To Be Scheduled

Date: **4/11/2006**

Time: **1:34:01PM**

User: **rb.1**

Company: **DemoCompany**

## Project Overdue Actions Report

Project Name: Marketing Improvement Project

Project-ID: **BIP01**

Item Order	Project Action	Who to do	Start Date	End Date	Status
007.00	Advertise for Contractor	John Walker	3/03/2006	5/03/2006	Scheduled
008.00	Interview Candidates	John Smith	5/03/2006	12/03/2006	Scheduled
009.00	Short List Contractors	Richard Burley	13/03/2006	20/03/2006	Scheduled
010.00	Appoint contractor	Richard Burley	21/03/2006	22/03/2006	Scheduled
011.00	Sign Contract	Richard Burley	22/03/2006	24/03/2006	Scheduled
012.00	Prepare/Copy Training material	John Walker	25/03/2006	27/03/2006	Scheduled
013.00	Train the Contractor	Richard Burley	25/03/2006	27/03/2006	Scheduled
014.00	Conduct Reseller Training	John Troughton	3/04/2006	21/04/2006	Scheduled
015.00	Survey Client Satisfaction	John Troughton	21/03/2006	9/07/2006	In Progress
016.00	Conduct Post Mortem on Course	John Smith	9/07/2006	15/07/2006	Scheduled
017.00	Design Course Enhancements	Richard Burley	15/07/2006	30/07/2006	Scheduled
017.50	Update Course Material	Richard Burley	31/07/2006	15/08/2006	Scheduled
018.00	Update Reseller CRM	Andrew Leap	24/04/2006	28/04/2006	To Be Scheduled
019.00	Report to Clients of Survey	Andrew Leap	3/07/2006	14/07/2006	To Be Scheduled

Date: **5/11/2006**  
 Time: **10:11:29AM**  
 User: **rb.1**  
 Company: **DemoCompany**

## All Projects Overdue Actions Report

Item #	Overdue Project Action	Who to do	Start Date	Date Due	Status
<b>Project Name: Marketing Improvement Project</b>			<b>Project Manager is Richard Burley</b>		
007.00	Advertise for Contractor	John Walker	3/03/2006	5/03/2006	Scheduled
008.00	Interview Candidates	John Smith	5/03/2006	12/03/2006	Scheduled
009.00	Short List Contractors	Richard Burley	13/03/2006	20/03/2006	Scheduled
010.00	Appoint contractor	Richard Burley	21/03/2006	22/03/2006	Scheduled
011.00	Sign Contract	Richard Burley	22/03/2006	24/03/2006	Scheduled
012.00	Prepare/Copy Training material	John Walker	25/03/2006	27/03/2006	Scheduled
013.00	Train the Contractor	Richard Burley	25/03/2006	27/03/2006	Scheduled
014.00	Conduct Reseller Training	John Troughton	3/04/2006	21/04/2006	Scheduled
015.00	Survey Client Satisfaction	John Troughton	21/03/2006	9/07/2006	In Progress
016.00	Conduct Post Mortem on Course	John Smith	9/07/2006	15/07/2006	Scheduled
017.00	Design Course Enhancements	Richard Burley	15/07/2006	30/07/2006	Scheduled
017.50	Update Course Material	Richard Burley	31/07/2006	15/08/2006	Scheduled
018.00	Update Reseller CRM	Andrew Leap	24/04/2006	28/04/2006	To Be Scheduled
019.00	Report to Clients of Survey	Andrew Leap	3/07/2006	14/07/2006	To Be Scheduled
<b>Project Name: New Test Project 6</b>			<b>Project Manager is Richard Burley</b>		
001.00	Project Action #1	John Troughton	21/03/2006	26/03/2006	Scheduled
002.00	Project Action #2	Richard Burley	26/03/2006	5/04/2006	Scheduled
003.00	Project Action #4	John Smith	5/04/2006	20/04/2006	To Be Scheduled
004.00	Project Action #3	Richard Burley	31/03/2006	5/04/2006	To Be Scheduled
005.00	Project Action #5	Richard Burley	10/04/2006	21/04/2006	Scheduled
<b>Project Name: Sample Project - ET1</b>			<b>Project Manager is Eric Tjoeng</b>		
001.00	Task1	Richard Burley	3/04/2006	13/04/2006	Scheduled
002.00	Task2	Eric Tjoeng	3/04/2006	23/04/2006	Scheduled
<b>Project Name: Test Project 7</b>			<b>Project Manager is Darryl Winder</b>		
001.00	PA-1	Clair Leap	22/03/2006	21/04/2006	Scheduled
002.00	Project Action #2	Clair Leap	27/03/2006	11/04/2006	To Be Scheduled
<b>Project Name: Test-3</b>			<b>Project Manager is Richard Burley</b>		
002.00	Confirm Resources	Richard Burley	16/03/2006	24/03/2006	Scheduled
003.00	Brief Project Resources	Richard Burley	24/03/2006	27/03/2006	Scheduled

Date: 5/11/2006

Time: 3:25:20PM

User: rb.1

Company: DemoCompany

## Incident Item Details & Status

**Incident Item #** 3 **linked to Action-ID:** 1.11 **Investigate new markets & products**

**Incident Cause:** Goods returned faulty

**Incident Description:** Wigits purchased on 1/5/06 were returned because mechanical parts did not work. Full refund given to customer.

**Date Raised:** 5/05/2006 **Raised By:** Richard Burley

**Date Due:** 9/05/2006 **Allocated To:** Clair Leap

**Priority:** High **Status:** Active

**Incident Category:** Customer

**Incident Rectification:**

RB.1 5/5/2006 1.10PM:  
Return goods to supplier and obtain a credit off next order.  
Do not close incident until credit item is sighted on next order.

CL.1 6/5/2006 9.00AM:  
Damaged goods received from customer today and returned to supplier with a covering letter requesting a credit at full cost price off our next order to filled.

CL.1 8/5/2006 9.00AM:  
Invoice 987666 received from supplier for next shipment and P. Smith from Accounting Department verbally confirmed that a credit was included for faulty Wigits.  
Awaiting QA check on this current shipment to confirm that no Wigits are faulty in this shipment. When QA check is clear then this incident report can be closed.

Date: **4/11/2006**  
Time: **1:03:12PM**  
User: **rb.1**  
Company: **DemoCompany**

## Open Incidents Log

### Incident Category

Date Due	Date Raised	Incident Description	ID	Person to Resolve	Initiated by	Status
<b>Customer</b>						
16/01/2006	13/01/2006	Late delivery	1.13	Richard Burley	John Troughton	New
9/05/2006	5/05/2006	Goods returned faulty	1.11	Clair Leap	Richard Burley	Active
22/05/2006	12/05/2006	Delayed deliver	4.44	Richard Burley	Richard Burley	Active
6/06/2006	1/06/2006	Unhappy with product quality	1.12	Richard Burley	Richard Burley	Active
9/09/2006	8/09/2006	Late delivery	9.99	Richard Burley	Richard Burley	New
<b>Manufacturing</b>						
23/09/2006	16/09/2006		9.99	Scott Jones	Scott Jones	New
6/11/2006	7/09/2006		9.99	Clair Leap	Richard Burley	New
<b>OH&amp;S</b>						
17/01/2006	13/01/2006	Wet floor	5.51	Mary Guest	Richard Burley	New
22/01/2006	14/01/2006	RSI Complaint	1.31	Richard Burley	Blake Wilson	Active
7/04/2006	3/04/2006	Personal Injury	1.25	Eric Tjoeng	Eric Tjoeng	Active
14/06/2006	9/06/2006	No Danger sign	2.54	Clair Leap	Richard Burley	New
29/08/2006	24/08/2006	Cause	9.99	George Souris	Richard Burley	New
10/10/2006	31/07/2006	No money	9.99	Richard Burley	Richard Burley	Active
<b>Retail</b>						
1/07/2006	1/06/2006	Vandal damage	1.44	Richard Burley	Richard Burley	Active
<b>Supplier</b>						
22/03/2006	22/03/2006	Faulty paper delivered	1.45	John Smith	Richard Burley	New

Date: 4/11/2006

Time: 1:00:40PM

User: rb.1

Company: DemoCompany

## Incidents Overdue Report

### Incident Category:

Date Raised	Incident Overdue	ID	Person to Resolve	DateDue	Initiated by	Status
<b>Customer</b>						
5/05/2006	Goods returned faulty	1.11	Clair Leap	9/05/2006	Richard Burley	Active
1/06/2006	Unhappy with product	1.12	Richard Burley	6/06/2006	Richard Burley	Active
13/01/2006	Late delivery	1.13	Richard Burley	16/01/2006	John Troughton	New
12/05/2006	Delayed deliver	4.44	Richard Burley	22/05/2006	Richard Burley	Active
8/09/2006	Late delivery	9.99	Richard Burley	9/09/2006	Richard Burley	New
<b>Manufacturing</b>						
16/09/2006		9.99	Scott Jones	23/09/2006	Scott Jones	New
<b>OH&amp;S</b>						
3/04/2006	Personal Injury	1.25	Eric Tjoeng	7/04/2006	Eric Tjoeng	Active
14/01/2006	RSI Complaint	1.31	Richard Burley	22/01/2006	Blake Wilson	Active
9/06/2006	No Danger sign	2.54	Clair Leap	14/06/2006	Richard Burley	New
13/01/2006	Wet floor	5.51	Mary Guest	17/01/2006	Richard Burley	New
31/07/2006	No money	9.99	Richard Burley	10/10/2006	Richard Burley	Active
24/08/2006	Cause	9.99	George Souris	29/08/2006	Richard Burley	New
<b>Retail</b>						
1/06/2006	Vandal damage	1.44	Richard Burley	1/07/2006	Richard Burley	Active
<b>Supplier</b>						
22/03/2006	Faulty paper deliverec	1.45	John Smith	22/03/2006	Richard Burley	New

Date: **4/11/2006**

Time: **12:38:05PM**

User: **rb.1**

Resource: **JT.1**

Company: **DemoCompany**

## Annual Appraisal Calendar

**Supervisor**  
**John Troughton**

**Supervisor Role**  
**Chief Financial Officer**

Employee Hierachy	Review Date	Phone Number
Richard Burley	31/01/2006	02-9431 5305
Mary Guest	31/01/2006	02-9431 5305
Danielle Bourke	15/03/2006	02-9958 4170
Tim Elliott	30/07/2006	02-9958 4170
Scott Jones	6/09/2006	0401-226 869
John Walker	11/10/2006	0416-146 256
Frederick Smith	25/10/2006	
Clair Leap	31/01/2007	02-6235 9039
Blake Wilson	31/01/2007	0423-027605



Date: 4/11/2006  
Time: 12:48:06PM  
User: rb.1  
Company: DemoCompany

## Performance Appraisal

**Employee Name**  
Richard Burley

**Employee Role**  
National Sales Manager

**Reports To**  
The Management Practice

<u>Job ID</u>	<u>Job Action Description</u>	<u>Measure</u>	<u>Target</u>
1.1	Prepare Direct Mail Campaigns	Letters mailed or emailed	200
<b>History:</b> 1/2/06 Mail Campaigns are in progress but not complete. RJB Note: Blah Blah			
<b>Review :</b>			
1.2	Develop Reseller Alliances		
<b>History:</b>			
<b>Review :</b>			
1.3	Target Industry Association alliances		
<b>History:</b>			
<b>Review :</b>			
1.4	Develop strategic Distributor Relationships		
<b>History:</b>			
<b>Review :</b>			
1.5	Maintain continuous qualified prospect pipeline	New prospects per day	1
<b>History:</b> 7/2/06: An average of 20 phonecalls are required to generate a single new prospect			

<u>Job ID</u>	<u>Job Action Description</u>	<u>Measure</u>	<u>Target</u>
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Review :

2.1 Develop & maintain company Price List Published price list

History:

Review :

2.2 Ensure 'solutions' focus within all sales

History:

Review :

2.3 Prepare job quotations # of proposals submitted 5

History:

Review :

2.4 Include 'upsell' in all proposals

History:

Review :

2.5 Set & monitor high quality service delivery New sales to existing clients 12

History:

Review :

<u>Job ID</u>	<u>Job Action Description</u>	<u>Measure</u>	<u>Target</u>
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3.1	Qualify all quotes	Lost quotes/accepted sales	Less than 10%
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**History:**

**Review :**

3.2	Submit sales forecast to CEO		
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**History:**

**Review :**

3.3	Analyse lost business & keep client history		
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**History:**

**Review :**

3.4	Recommend product changes & keep client history		
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**History:**

**Review :**

3.5	Achieve sales target	Value of business contracted	\$250,000
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**History:**

**Review :**

4.1	Foster 'Key Account' culture		
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**History:**

<u>Job ID</u>	<u>Job Action Description</u>	<u>Measure</u>	<u>Target</u>
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**Review :**

4.2	Develop incremental business from client base	+ \$ sales from existing clients	10%
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**History:**

**Review :**

4.3	Resolve any client issues	Issues escalated by clients	Less than 3
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**History:**

**Review :**

4.4	Obtain client feedback & written references	Written reference	3
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**History:**

**Review :**

4.5	Resolve & collect O/S invoices	Outstanding accounts	Less than 10% of billings
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**History:**

**Review :**

5.1	Develop & publish all sales collateral
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**History:**

**Review :**

<b>Job ID</b>	<b>Job Action Description</b>	<b>Measure</b>	<b>Target</b>
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5.2 Provide input data & website wording

**History:**

**Review :**

5.3 Recommend new marketing initiatives

New iinitatives  
submitted

4

**History:**

**Review :**

5.4 Develop strong bond with S/W developers

**History:**

**Review :**

5.5 Implement special marketing projects

**History:**

**Review :**

Date: **4/11/2006**

Time: **11:43:14AM**

User: **tmp.1**

Company: **DemoCompany**

## 30-Day Job Action Review Planner

**Supervisor Name**  
*The Management Practice*

**Supervisor Role**  
*Improvement Manager*

Review Date	Direct Reporting Staff Name	Job Action to be Reviewed
8/11/2006	Richard Burley	Prepare job quotations
13/11/2006	Clair Leap	Maintain continuous qualified prospect pipeline
18/11/2006	Richard Burley	Prepare Direct Mail Campaigns
23/11/2006	Richard Burley	Maintain continuous qualified prospect pipeline
28/11/2006	Clair Leap	Achieve sales target
30/11/2006	Clair Leap	Prepare Direct Mail Campaigns
30/11/2006	Richard Burley	Achieve sales target