ManagePro/MProWeb April 2005 Newsletter **eNews Letter April 2005**

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Note:
If printing newsletter - use landscape mode

1. Use the Assistant/Today's Plan - the number one tool for organizing and prioritizing.

It's baseball season and for this tip I want you to think of using the Assistant in ManagePro or the Today's Plan in MProWeb as you coaching from the dugout. Whatever else is going on in the game, this is the one view, the one perspective that you will use (whether managing yourself or a team) to maintain your tactical overview of the game, control the pace and who's playing what position, batting next, etc. It's your primary tool for organizing and prioritizing work through out a given day. It clearly identifies who's doing what and prioritizing what today!

Both the Assistant and the Today's Plan display four important data points for the today's tactical management challenges. Get these cleanly identified **every morning** and you'll be way ahead in keeping your time organized, and coordinating the work of your direct reports on that moving target of "what's most important today." The data points (tabbed views) I use all the time are:

1. My to-dos due today (and from the last 14 days that still aren't complete)

2. My events or appointments for today

3. What's priority 1 for today (action steps and tasks to complete, progress updates to be entered, keeping projects moving...).
   Note: I set priority one by briefly scanning ongoing objectives and projects within the My Goals or Top Goals views.

4. What do each of those areas look like for my key direct reports? e.g. are their priorities aligned with mine? If your database is set up correctly, the Who button above the top of the Assistant view will have a drop down list to allow you to view these tabbed views for each of your direct reports.

Take a look at these views in your program. It provides focused information at your fingertips. Let me go over some additional tips I use to make it work for me.

Assistant View (ManagePro)
1. Make sure you have a tab that displays all goals (action steps and tasks) not completed that have a priority of 1. Ideally this list shouldn't be longer than one screen for you. If it is, try these two techniques to help organize this view into something manageable that you can get your arms around by: a) sort by date (non-ascending) and focus on those issues due this week, and b) filter the view, ex. use a filter of Due Date, Within the Next, 7 days.

2. If you organize your projects based upon a customer or job ID (using the User Roll-Down Text 1 field) or by identification with a strategic initiative (using one of the pick-list fields, such as Category), include that field for reference in your Assistant tabbed views. For the To-dos and Event tabbed views, you may also want to include the field "Related Goal".

Today's Plan (MProWeb)
1. The data to work with in your Today's Plan will only be as good as your review of your goals and projects. So make a point of reviewing your goals and projects first for a few minutes, and pushing records into your Today's Plan worksheet by highlight the record in the GAPR view, right clicking and choosing the Today's Plan option that flags the record for either review (keeping your eye on it) or needing a progress update.

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2. Setting up Scorecards & Metrics

How many goals are you tracking metrics or measuring performance on using the scorecard feature? How many of your performance metric scores are current? If we could show you how to address both issues in 5 minutes, would you be interested in using the scorecard feature in ManagePro and MProWeb to make it easier to be succeed (knowing the score almost always helps performance)? Stick with me and let me walk you through the setup process and my tips for keeping the scorecard current.

10 Steps to Setting up a Scorecard (apply to both ManagePro & MProWeb)

1. Start by highlighting the record you want to add scorecard metrics to, right click and choose the "Target/Results/Score Config" option.

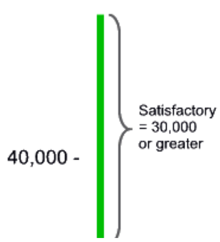
2. When you right click on a Goal and choose **Target/Results/Score**, you will get a pop up screen that will allow you to configure the formatting and scoring options of the Target, Results and Scoring Fields.

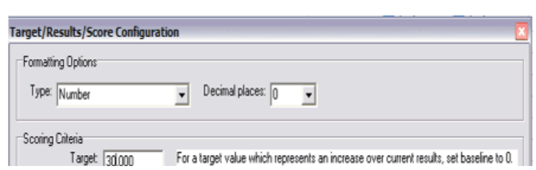
3. Select the type of data you are going to use to track performance over time. e.g. will this be tracked as a number (ex. # of new customers/month), a currency (ex. $5,550,291 in sales) or a % (ex. 10% as defined by Year to Date Sales Compared to Previous Year).

4. Set the Target amount (ex. 10%) and leave the Baseline set to 0 unless your target represents a negative trend (ex. you would like to reduce overhead from 34% to 29%). If are targeting a negative trend, set the Baseline value to last year's number or twice the value of the target.

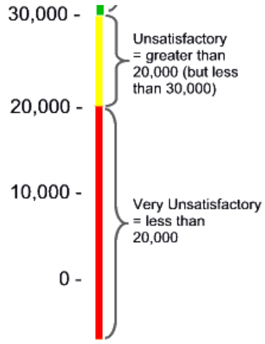
5. Set up your Scoring Ranges - the **Scoring Criteria** section provides the capability for determining what level of score equates with a Score status display of Satisfactory (Green), Unsatisfactory (Yellow) or Very Unsatisfactory (Red). Note that the Yellow range will be over-ruled by either Green or Red. Let's take a look at how it works using the example on the right:

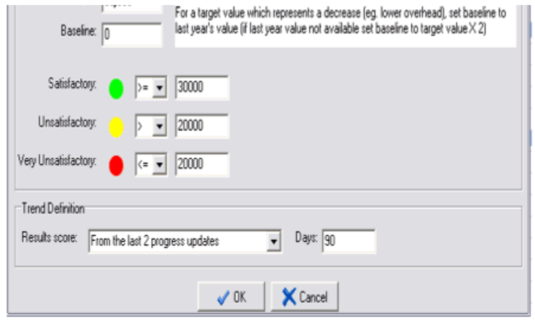
Think of the Scoring Range as a line stretching from 0 or less, out to your target value and beyond. Here we've set the target value to 30,000. Any results value of 30,000 or above will generate a green score





value of 30,000 or above will generate a green score globe. Any result entered that is above 20,000 (but below 30,000 because Green will over-ride Yellow) will generate a yellow globe. Any result that equals or is below 20,000 will generate a red globe. If you graphed it on a vertical line, the configuration on the right it would look like ....>





6. Remember, all scores are pulled from the value you place in the *Results* field in a Progress Update entry. You must enter results via progress updates, otherwise the software has no data to calculate your progress towards your target.

7. In MProWeb you'll need to identify where you want the scorecard to display through the right click *Performance* option. E.g. you can place it in an individuals' or a business groups' performance scorecard, or make it visible to the entire organization by selecting the Enterprise option.

8. In ManagePro you will find the scorecards displayed in the *Scorecard View* tab within the Top Goals and Action Plan view. To display the scorecards on an individual basis (found in the My Goals, *Performance Review* tab), you will need to additionally click the *Review* checkbox in the goal details view.

9. Tip 1. MProWeb performance views already display the date of the last progress update, we suggest you add this column to the *Scorecard View* in ManagePro as well, so that you know how current the latest result is. It's also a good prompt to keep your measurements up to date.

10. Tip 2. Reduce the clutter when using ManagePro by filtering out the records in the *Scorecard View* that are not being measured. A simple way to do that is to use the Config button and save the filter, Results - Greater than - 0, to the *Scorecard View*.

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3. Tips on Downloads and Deployment

Here's a couple of tips that will save you both time and effort.

1. If you are upgrading your ManagePro license from a pre 6.7 version,

- Do not attempt to upgrade by downloading a demo copy if you already have a Team version
- Instead contact our office (email pst@managepro.com, ph. (707) 487-3000) and one of our staff will walk you through the process quickly and efficiently.

2. If you are wondering about how to get others to use the program -
We can answer your questions and come along side to help you get around this common implementation challenge.

It always helps to understand the process and what to expect. We've got an excellent single page map that depicts the standard implementation milestones. You can view it by **CLICKING HERE**. You will also find a valuable database template for rolling out ManagePro in your C:/Program Files/ManagePro directory. You can open and work with it by opening ManagePro and selecting the MProRollout database.

Most of all... if you are at all concerned about managing the implementation and adoption cycle, call us.

We've got excellent people that are only a phone call away to help you quickly move through the "getting people to use the software" part of the implementation process.

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Hope your month of April is closing well and that you find lots of success using the Assistant or Today's Plan and Scorecards in May.

Rodney Beim, Ph.D.
CEO, Performance Solutions Technology, LLC

P.S.

Don't forget the training event coming up on July 27-29th.
It's a great opportunity to get all of your questions answered about ManagePro and MProWeb,
and meet users from all over the country and learn from their experiences as well.

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