



# Mirror Streamline

## Employee Performance Management

On-line performance management software solution for optimal employee outputs

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# Mirror Streamline Employee Performance Management

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## Introduction

Mirror Streamline is a real-time business management solution, integrating all major functional areas of an organization – HR and Payroll, Accounting, Inventory, Material Requisition Planning, and Manufacturing. It also has a development platform to extend and customize the generic functionalities.

This document focuses on the **Performance Management (PM)** module within HR. The benefits of an efficient PM system are highlighted, and examples are given of how PM is implemented via the Mirror Streamline business platform.

For more information on implementation options, costs, etc., or to test-drive the software for a no-obligation evaluation, you are welcome to visit [www.mirrorsa.co.za](http://www.mirrorsa.co.za).

## Benefits of an Efficient PM System

For PM to really work, executives need to be clear on the goals of the organization, and then be able to cascade down the required strategies and tactics into the **role profiles** and **performance agreements** of all employees. Communication between manager and employees is essential for increasing productivity, improving morale and motivation, and allowing coordination of each employee’s work with the goals of the unit and the organization.

PM can reduce the amount of “supervision” you need to provide by clarifying for employees what they need to do and **why** they need to do. PM allows you to identify problems when they occur so you can fix them early. The need to discipline is reduced as a result.

Because of the PM process being documented on the system, PM also protects you from frivolous lawsuits and complaints should you need to discipline employees for ongoing poor performance.

## Define Role Profiles

The following are defined per role profile:

- Minimum and ideal Qualifications, Experience, Knowledge, Skills and Personal Attributes
- A list of Key Responsibility Areas (KRAs) and relative importances(weights)

Type	No.	Description	Weight
C	1	Client orientation and customer focus	100.0
C	2	Financial management	100.0
C	3	People management and empowerment	100.0
N	1	Financial management support	100.0
N	2	Management oversight over the administration of invoice and claim payments	100.0

>>> Outputs & KPIs

1/5 Remove

Add Edit Close

There are two types of KRAs: Normal and CMC (Core Management Criteria). CMC are applicable to employees on Senior Management Services (SMS) salary levels. CMC account for 20% of the weighted calculated scores, and normal KRAs for 80%.

- Per KRA, required outputs and Key Performance Indicators (KPIs) defining how performance will be measured in terms of **Fully Effective** (score 3), **Significantly Above Standard** (score 4), and **Outstanding** (score 5)

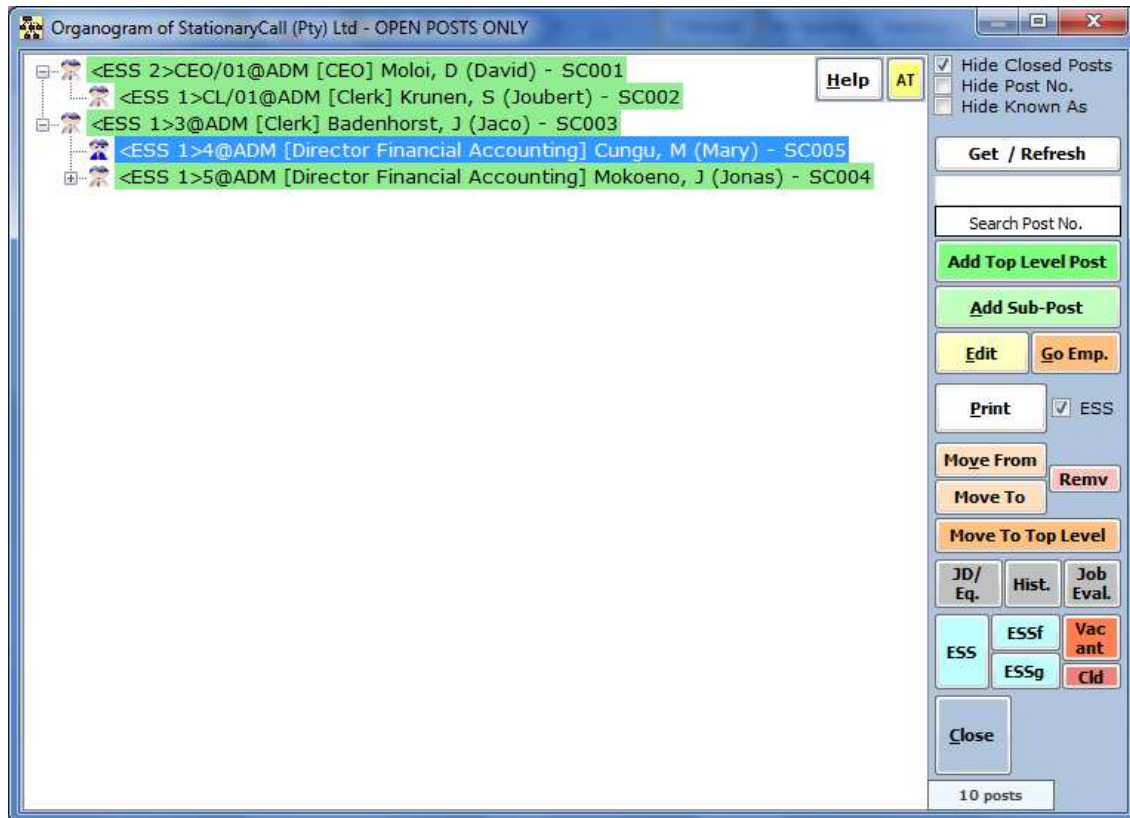
No.	Description	Rating 3 KPI	Rating 4 KPI	Rating 5 KPI
1	Oversight over the accurate and timeous payment of invoices, claims, salaries and transfer payments.	Participation in Help Desk operations of OCFO. Ensures that payments are made within 30-days. Ensuring that all other financial transactions are finalized within 30 days.	Ensures that payments are made within 15 days. Ensure that all other financial transactions are finalized within 15 days.	
2	Integrated and effective service delivery to internal and external customers i.t.o. financial administration.	Participation in OCFO training and awareness initiatives. Ensure the availability and communication of policies. Ensures feedback to customers on general enquiries within 5 working days.	Ensure 4 training sessions per annum for relevant staff on financial policies and processes. Ensures feedback to customers on general enquiries within 2 working days.	

2/2 Remove

Add Edit Close

## Use Organogram to Define Reporting Structures

Use the organogram to create a dynamic reporting structure. For instance, if an employee is transferred to a new post, the system automatically allocates a new line manager to the employee.



In the above example, Mary Cungu's line manager is David Moloi.

## Line Managers set up Performance Agreements

For each performance cycle, typically from April to March the next year, the line manager can quickly create a new performance agreement based on the role profile, and then expand the performance agreement as required for the current cycle:

Performance Agreement for cycle ending 31-Mar-2010 for Cungu; Mary (SC005)

Engagement on cycle end date: Director Financial Accounting, Division; Admin, Post No.4, from 04-Jan-2010 Transfer [Post Level: 1 Engagement: 10]

Quality Assurance by Line Manager Change Print/View Job Description for Post Use As Default for new PA Print /View PA

Type	No.	KRA Description	Bi-Annual Weight	Annual Weight
C	1	Client orientation and customer focus	100.0	100.0
C	2	Financial management	100.0	100.0
C	3	People management and empowerment	100.0	100.0
N	1	Financial management support	100.0	100.0
N	2	Management oversight over the administration of invoice and claim payments	100.0	100.0
N	3	Special Project For This Year	100.0	100.0

Outputs, KPIs & Comments

Personal Dev. Plan & Career Aspirations

Sign-Offs

1/6

Add Edit Remove

Close

## Record PM Progress

During the course of the performance cycle, employees and line managers capture scores and comments:

Outputs, Key Performance Indicators(KPIs), Scores and Comments on Client orientation and customer focus

Outputs, KPIs and Scores Comments by Employee, Line Manager and Quality Assurance

Logged	By	Name /Initials	Comments
05-May-2009 15:55	Cungu	Mary	Since last year, our computers have been infected with a virus and as a result, our computers became very slow. The viruses have now been removed and service levels have been restored to accepted standards.
20-May-2009 16:01	Moloi	David	I received complaints from service providers that invoices are not paid on time. I communicated this to Mary and she assured me the delays were due to the suppliers not providing sufficient information.

Add Edit Remove

2/2

Close

## Sign off Various Stages in the PM Process

The actions taken by employees and line managers automatically feed through to the summary page and management reports:

Sign-offs: Performance Agreement for cycle ending 31-Mar-2010 for Cungu; Mary (SC005)

Logged	Logged By	Sign-off Type
15-Apr-2009 15:52	Moloi, David (SC001)	Performance Agreement Finalised
15-Apr-2009 15:53	Cungu, Mary (SC005)	Performance Agreement Finalised
15-Jul-2009 16:27	Moloi, David (SC001)	June Quarterly Review Finalised
15-Jul-2009 16:28	Cungu, Mary (SC005)	June Quarterly Review Finalised
09-Oct-2009 16:34	Moloi, David (SC001)	September Bi-Annual Review Finalised
09-Oct-2009 16:35	Cungu, Mary (SC005)	September Bi-Annual Review Finalised

**Add** Bi-Annual Score: 110.0 1/6  
 Annual Scores not yet fully captured  
**Close**

Edit performance cycle record

Period From 01-Apr-2009 to 31-Mar-2010 (F5 previous) (NR = Not Required)

	SUBMITTED	FINALISED	EXTENSION
<b>Performance Agreement</b>	15-Apr-2009	15-Apr-2009	<input type="checkbox"/> NR
Notes			
<b>June Quarterly Review</b>	15-Jul-2009	15-Jul-2009	<input type="checkbox"/> NR
Notes			
<b>September Bi-Annual Review</b>	09-Oct-2009	09-Oct-2009	<input type="checkbox"/> NR
Notes			
<b>December Quarterly Review</b>			<input type="checkbox"/> NR
Notes			
<b>April Annual Appraisal</b>			<input type="checkbox"/> NR
Notes			

Allow Late Submission Reason

**Bonus Pool:** Bi-Annual Performance Score 110 % Annual Performance Score %  
 Months 6 Months 6 WAvg. 55%

Nature Of Award To be determined New Salary Package  
 Value Of Award Bonus Percentage % Effective From

Comments **View Engagements**

**Cancel** **Help**  SEAL ESS

## Management Reporting

Performance Management Reports

Divisions: (3/3) ADM; MRK; PRS Select

Establishment as on / Cycles ending: 31-Mar-2010 All Salary Levels  
Discrepancy Checks Listing per employee  
 Report Format: Standard Report

Compliance as on: 20-Feb-2010 Sal. Level Months as on: 31-Mar-2010  
 AVG = (Bi-Annual Score \* M/Length + Annual Score \* (Length-M)/Length)

Set Participation Factor to ZERO for Late Submission(s)

**Proceed**

Help Close

## Detailed Record of Performance Process

### PERFORMANCE CYCLE AND JOB INFORMATION SUMMARY:

Employee	Cungu; Mary (SC005)
Appraisal Period	01-Apr-2009 to 31-Mar-2010
Job Title	Director Financial Accounting
Post Number	4
Division	Admin
Branch	PTA
Chief Directorate	CD1
Directorate	DIR1
Sub-Directorate	SD1
Salary Level	13
Post reports to / Line Manager	Moloi; David (SC001) - Job Title:CEO, Post No.CEO/01, Division:Admin
QA	Quality Assurance by Line Manager
Date Printed	09-Oct-2009 by SC005

### PRIMARY PURPOSE OF THE JOB:

Oversight and monitoring of financial transactions

## PA BASED ON ROLE PROFILE: Director Financial Accounting

Key Responsibility / Performance Area (KRAs)	Outputs and Key Performance Indicators (KPIs)	Weights
<p>CMC 1. Client orientation and customer focus</p>	<p><b>1. Oversight over the accurate and timeous payment of invoices, claims, salaries and tranfer payments.</b>  <u>KPI3:</u> Participation in Help Desk operations of OCFO. Ensures that payments are made within 30-days. Ensuring that all other financial transactions are finalized within 30 days.  <u>KPI4:</u> Ensures that payments are made within 15 days. Ensure that all other financial transactions are finalized within 15 days.  <u>KPI5:</u>  <i>* Bi-Annual Score: 4 ** No Annual Score</i></p> <p><b>2. Integrated and effective service delivery to internal and external customers i.t.o. financial administration.</b>  <u>KPI3:</u> Participation in OCFO training and awareness initiatives. Ensure the availability and communication of policies. Ensures feedback too customers on general enquiries within 5 working days.  <u>KPI4:</u> Ensure 4 training sessions per annum for relevant dti staff on financial policies and processes. Ensures feedback to customers on general enquiries within 2 working days.  <u>KPI5:</u>  <i>* Bi-Annual Score: 3 ** No Annual Score</i>  <b>Logged 05-May-2009 by Cungu, Mary:</b> Since last year, our computers have been infected with a virus and as a result, our computers became very slow. The viruses have now been removed and service levels have been restored to accepted standards.  <b>Logged 20-May-2009 by Moloi, David:</b> I received complaints from service providers that invoices are not paid on time. I communicated this to Mary and she assured me the delays were due to the suppliers not providing sufficient information.</p>	<p>Bi. 100 An. 100</p>
<p>CMC 2. Financial management</p>	<p><b>1. Sufficient funding for the operations of the Directorate by means of the budget process.</b>  <u>KPI3:</u> Accurate costing of budget requirements of Directorate. Submission of budget inputs of Directorate by due dates.  <u>KPI4:</u> Identify and implement cost saving measures whereby real saving of 10% can be effected on relevant spending items.  <u>KPI5:</u>  <i>* Bi-Annual Score: 5 ** No Annual Score</i></p> <p><b>2. Effective expenditure and cash flow management</b>  <u>KPI3:</u> Monthly review of expenses and commitments according to the cash flow projections. Monthly reporting on variances.  <u>KPI4:</u> Quarterly identification and reporting of savings and shortfalls. Budget spending within 2% of allocated funds.  <u>KPI5:</u>  <i>* Bi-Annual Score: 4 ** No Annual Score</i></p> <p><b>3. Effective management of the assets and resources of the Directorate</b>  <u>KPI3:</u> Quarterly verification of assets and sign-off of inventory reports  <u>KPI4:</u> Obtain an asset register for all DFA computer equipment. Quarterly verification of such assets. Upgrading and/or replacement of computers, if and where required.  <u>KPI5:</u>  <i>* Bi-Annual Score: 4 ** No Annual Score</i></p>	<p>Bi. 100 An. 100</p>
<p>CMC 3. People management and empowerment</p>	<p><b>1. Effective performance management</b>  <u>KPI3:</u> Submit agreements and appraisal reports by due date of Business unit  <u>KPI4:</u> Ensure the availability of evidence for all higher and lower than average scores, and the implementation of processes to ensure standard norms and criteria.  <u>KPI5:</u>  <i>* Bi-Annual Score: 3 ** No Annual Score</i></p> <p><b>2. Effective development of staff and capacity building</b>  <u>KPI3:</u> Ensure the identification of training requirements of all staff and</p>	<p>Bi. 100 An. 100</p>

	<p>appropriate training interventions. Ensure updated PDPs for all staff and training attendance.</p> <p><b>KPI4:</b> Quarterly updating of the PDPs of staff in accordance with newly identified risks, and ensure orientation or training interventions to address specific risks. Arrange specific training or orientation interventions, where possible.</p> <p><b>KPI5:</b></p> <p><i>* Bi-Annual Score: 4.5 ** No Annual Score</i></p>	
1. Financial management support	<p><b>1. Adherence to government requirements in terms of financial management.</b></p> <p><b>KPI3:</b> Ensures the review and updating of all DFA Financial policies once per annum, being petty cash, the entertainment and S&amp;T policies.</p> <p><b>KPI4:</b> Ensures the training twice per annum of dti staff on the policy provisions. Ensures that the provisions of the policies are communicated to staff by means of annual circulars and flash notices. Ensures that Divisional advisors are trained on the policies and that they apply the same within divisions.</p> <p><b>KPI5:</b></p> <p><i>* Bi-Annual Score: 3.5 ** No Annual Score</i></p> <p><b>2. Co-ordinate financial administration between DFA staff and Divisional advisors.</b></p> <p><b>KPI3:</b> Ensures an understanding by Divisional advisors of their roles and responsibilities i.t.o DFA functions, by means of an annual orientation sessions. Ensure the transfer of other identified functions to Divisional by 31 Oct each year as per Phase 2 of Divisional advisors project, inclusive of orientation training.</p> <p><b>KPI4:</b> Focussed capacity building interventions for divisional advisors by 30 Sep each year on 6 DFA related processes (Invoices, claims, petty cash, revenue, salaries, SCOA)</p> <p><b>KPI5:</b></p> <p><i>* Bi-Annual Score: 2 ** No Annual Score</i></p> <p><b>Logged 09-Oct-2009 by Moloi, David:</b> More to be done to promote communication between DFA and other staff members.</p>	Bi. 100 An. 100
2. Management oversight over the administration of invoice and claim payments	<p><b>1. Oversight &amp; control over the accurate and timeous payment of invoices and sundry payments</b></p> <p><b>KPI3:</b> Monthly monitoring of payments by means of Help Desk and other reports, to ensure that payments are finalized within 30 working days.</p> <p><b>KPI4:</b> Weekly monitoring of payments by means of Help Desk and other reports to ensure that payments are made within 15 days.</p> <p><b>KPI5:</b></p> <p><i>* Bi-Annual Score: 3 ** No Annual Score</i></p> <p><b>2. Oversight and control over the accurate and timeous payment of transfers and subsidies</b></p> <p><b>KPI3:</b> Monthly monitoring of the timeous receipt and payment of transfers and subsidies, i.e. recording to compliance requirements and cash flow projections.</p> <p><b>KPI4:</b> Establish by 30 Nov each year a work process with dti Divisions and the Agency unity in respect of transfer payments, whereby compliance can be ensured and turnaround times can be improved. Implement accounting checklists and other appropriate controls by Oct each year.</p> <p><b>KPI5:</b></p> <p><i>* Bi-Annual Score: 3 ** No Annual Score</i></p>	Bi. 100 An. 100
3. Special Project For This Year	<p><b>1. Implement new system</b></p> <p><b>KPI3:</b> By Dec 2009</p> <p><b>KPI4:</b> By Nov 2009</p> <p><b>KPI5:</b></p> <p><i>* Bi-Annual Score: 5 ** No Annual Score</i></p> <p><b>Logged 09-Oct-2009 by Moloi, David:</b> Done much faster than expected.</p>	Bi. 100 An. 100

**BI-ANNUAL SCORE: 110.0**  
**BI-ANNUAL SCORE ON SUMMARY PAGE: 110.0**  
**ANNUAL SCORES NOT YET FULLY CAPTURED**

**INTERNAL CLIENTS / STAKEHOLDERS - KEY RECEIVERS OF THE WORK AND THEIR REQUIREMENTS:**

Account managers, employees

**EXTERNAL CLIENTS / STAKEHOLDERS - KEY RECEIVERS OF THE WORK AND THEIR REQUIREMENTS:**

Suppliers

**POST COMPETENCY PROFILE:**

MINIMUM QUALIFICATIONS:

B.COM

IDEAL QUALIFICATIONS:

B.COM Hhrs

MINIMUM EXPERIENCE:

5 Years

IDEAL EXPERIENCE:

10 Years

**EMPLOYEE'S CAREER ASPIRATIONS:**

I want to keep on introducing changes in our division until we have optimal efficiencies. In the longer term, I would like to be involved on the strategic level of the organization.

**EMPLOYEE'S PERSONAL DEVELOPMENT PLAN:**

Competency To Be Developed	Details	When
Logged 09-Oct-2009: <i>Communication Skills</i>	TRAINING PROGRAMME: Business Writing Skills	Feb-2010