

Talent Development as a Profit Center

Holistic TD - Powered by P.E.R.F.O.R.M.

Q1: Who are the Top Performers?

“Objective Measurement”
Focus

The dashboard displays three main views for performance measurement:

- One-To-Many Measurements:** Shows a list of employees with their performance metrics for Pipeline Revenue. The table includes columns for Name, Date, and Value.
- One-To-One Measurements:** Allows for detailed comparison of individual employees across different metrics like Closed Business, Quarterly Revenue, and Pipeline Count.
- Peer-To-Peer Measurements:** Enables comparison between employees based on a Base Comparison (e.g., Manager) and a Secondary Comparison metric.

Each view includes a search bar, filters, and a 'Factors' icon. The Peer-To-Peer view also includes a 'History' section with icons for Sum, Learning, Jobs, Branch, and Factors.

Name	Date	Value
Andy Grantham	07/01/15	2590
Anna Brewer	07/01/15	1040
Benjamin Zervas	07/01/15	17759
Bob Connor	07/01/15	500
Candace Brown	07/01/15	12390
Chuck Keovn	07/01/15	1498
David Chicano	07/01/15	3675
David Krah	07/01/15	515
David Schenk	07/01/15	612
David Zingibl	07/01/15	700
Doug Obester	07/01/15	2890
Elizabeth Pedley	07/01/15	831
Eric McCoy	07/01/15	2400
Gilberto Morales	07/01/15	200
Greg Jones	07/01/15	2680

Name	Date	Value
Bob Connor	01/01/15	200
Bill Cote	01/01/15	6000

Name	Date	Value
Alasdair Be	07/01/15	1040
Alberto De	07/01/15	17759
Andy Gran	07/01/15	500
Anna Brew	07/01/15	12390

Name	Date	Value
	07/01/15	0
	03/01/14	197288
	03/01/14	77948
	03/01/14	740
	03/01/14	0

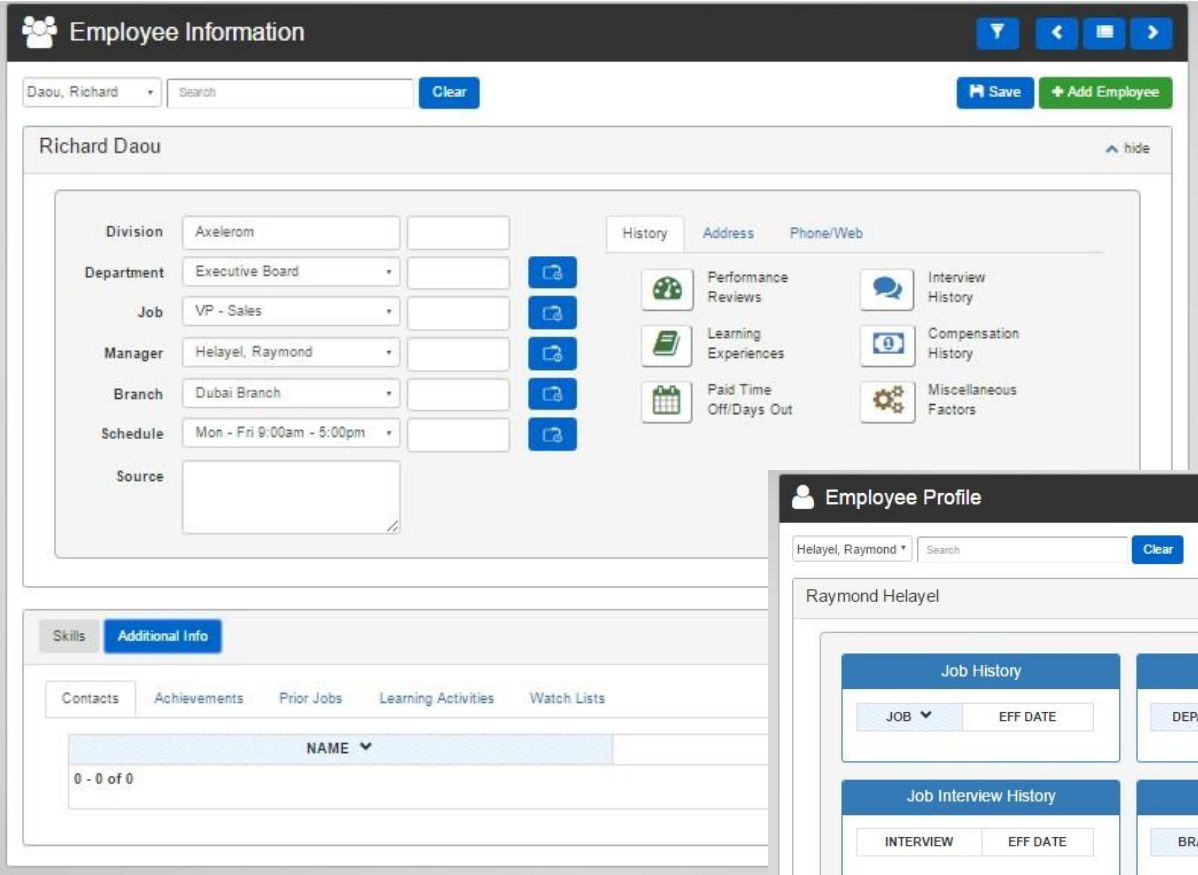
Comparison Type	Name	Date	Value
Base Comparison: Manager		01/01/15	200
		01/01/15	6000
		01/01/15	2000
Secondary Comparison		01/01/15	200
		01/01/15	6000
		01/01/15	2000
		01/01/15	297
		01/01/15	149
		01/01/15	160
		01/02/15	30
		01/02/15	100
		01/02/15	100
		01/02/15	100
		01/02/15	100
		01/02/15	100

Comparison Type	Name	Date	Value
Compare All		03/01/14	0
		03/01/14	197288
		03/01/14	77948
Peer Only		03/01/14	0
		03/01/14	197288
		03/01/14	740
		03/01/14	0
		03/01/14	5139704
		03/01/14	27064
		03/01/14	123961
		03/01/14	422831
		03/01/14	422831
		03/01/14	422831
		03/01/14	422831
		03/01/14	422831

Load ANY Measurement –
Create ANY Peer Group

Q2: How did they get to be one?

Connect the dots
to the
DETAILS



Employee Information

Daou, Richard | Search | Clear | Save | Add Employee

Richard Daou | hide

Division	Axelerom	
Department	Executive Board	
Job	VP - Sales	
Manager	Helayel, Raymond	
Branch	Dubai Branch	
Schedule	Mon - Fri 9:00am - 5:00pm	
Source		

History | Address | Phone/Web

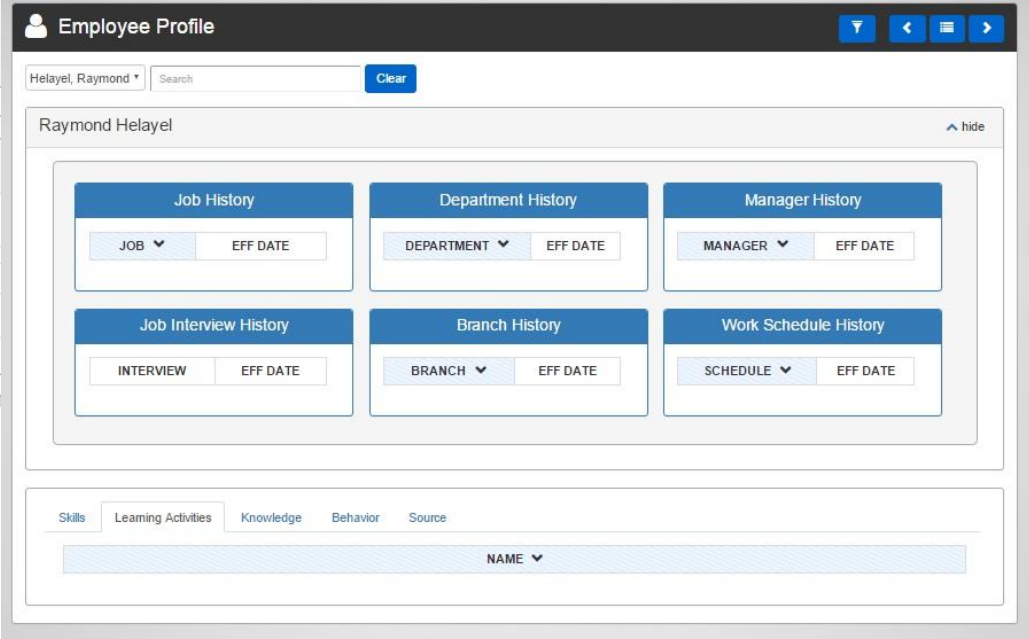
- Performance Reviews
- Learning Experiences
- Paid Time Off/Days Out
- Interview History
- Compensation History
- Miscellaneous Factors

Skills | Additional Info

Contacts | Achievements | Prior Jobs | Learning Activities | Watch Lists

NAME ▾

0 - 0 of 0



Employee Profile

Helayel, Raymond | Search | Clear

Raymond Helayel | hide

Job History	Department History	Manager History
JOB ▾ EFF DATE	DEPARTMENT ▾ EFF DATE	MANAGER ▾ EFF DATE
Job Interview History	Branch History	Work Schedule History
INTERVIEW EFF DATE	BRANCH ▾ EFF DATE	SCHEDULE ▾ EFF DATE

Skills | Learning Activities | Knowledge | Behavior | Source

NAME ▾

Employee Details
and Summary

TD Investment Results Analysis

Peer-To-Peer Measurements

Base Comparison: Manager
Secondary Comparison: [Redacted]

History: Sum, Learning, Jobs, Branch, Factors

Employees: [List of 12 employees]

Filters: Closed Business, Start Date, End Date, Compare All, Peer Only

Name	Date	Value
[Redacted]	01/01/15	200
[Redacted]	01/01/15	6000
[Redacted]	01/01/15	2000

1 - 3 of 396

Name	Date	Value
[Redacted]	01/01/15	200
[Redacted]	01/01/15	6000
[Redacted]	01/01/15	2000
[Redacted]	01/01/15	297
[Redacted]	01/01/15	149
[Redacted]	01/01/15	160
[Redacted]	01/02/15	30
[Redacted]	01/02/15	100
[Redacted]	01/02/15	100

1 - 9 of 396

Name	Date	Value
[Redacted]	03/01/14	0
[Redacted]	03/01/14	197268
[Redacted]	03/01/14	77948

1 - 3 of 292

Name	Date	Value
[Redacted]	03/01/14	0
[Redacted]	03/01/14	197268
[Redacted]	03/01/14	77948
[Redacted]	03/01/14	740
[Redacted]	03/01/14	0
[Redacted]	03/01/14	5139704
[Redacted]	03/01/14	27064
[Redacted]	03/01/14	123961
[Redacted]	03/01/14	422631

1 - 9 of 292

Peer-Group Context is VITAL

TD Investment Results Analysis

Peer-To-Peer Measurements

Base Comparison: Secondary Comparison:

History:

Employees

Name ^	Hire Date
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	

1 - 12 of 12 Employees

Closed Business

Compare All Peer Only

Name	Date ^	Value
[REDACTED]	01/01/15	200
[REDACTED]	01/01/15	6000
[REDACTED]	01/01/15	2000

1 - 3 of 396

Name	Date ^	Value
[REDACTED]	01/01/15	200
[REDACTED]	01/01/15	6000
[REDACTED]	01/01/15	2000
[REDACTED]	01/01/15	297
[REDACTED]	01/01/15	149
[REDACTED]	01/01/15	160
[REDACTED]	01/02/15	30
[REDACTED]	01/02/15	100
[REDACTED]	01/02/15	100

1 - 9 of 396

Quarterly Revenue

Compare All Peer Only

Name	Date ^	Value
[REDACTED]	03/01/14	0
[REDACTED]	03/01/14	197268
[REDACTED]	03/01/14	77948

1 - 3 of 292

Name	Date ^	Value
[REDACTED]	03/01/14	0
[REDACTED]	03/01/14	197268
[REDACTED]	03/01/14	77948
[REDACTED]	03/01/14	740
[REDACTED]	03/01/14	0
[REDACTED]	03/01/14	5139704
[REDACTED]	03/01/14	27064
[REDACTED]	03/01/14	123961
[REDACTED]	03/01/14	422631

1 - 9 of 292

Peer-Group Context is VITAL

P.E.R.F.O.R.M. Connects the Dots

cultivator  PERFORM
Resource Management System

Logout

Welcome to PERFORM

Putting the pieces together so you can achieve more

Show All 



COMPANY
INFORMATION

Business Results

Jobs Information

Organization Structure



EMPLOYEE
INFORMATION

Employee Information

Employee Profile

Job Candidates



EMPLOYEE
DEVELOPMENT

Learning Activities

Career Planning

Course Sessions

Course Registrations



EMPLOYEE
REVIEWS

Performance Reviews

Accountability Reviews

Best Practices



EMPLOYEE
PERFORMANCE

One-To-One Measurements

One-To-Many Measurement

Peer-To-Peer Measurement

Before We Go Further . . .

Supporting Resources

- www.Cultivator.com
- P.E.R.F.O.R.M. online demos
- *“All These People”* free download
- Inquiry@Cultivator.com
(Ken.Johnson@Cultivator.com)
- \$1,250 one-time set up fee / \$1,250 per company
annual subscription

“Job Task” Focus

Job Information

Account Manager

Account Manager hide

Series Details

Grade

Code

Job Tasks

Departments Required Learning Interview Questions Success Enablers **Accountability Factors**

FACTOR	DETAILS	MEASUREMENT	ACTIVE		
One improvement project active at all times.	Must be pursuing at least one opportunity to improve the customer's business using our services.	0	✓	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Phone call monthly.	Record at least one phone call every month.	0	✓	<input type="button" value="edit"/>	<input type="button" value="delete"/>
Visit quarterly.	Record at least one face-to-face visit per quarter.	0	✓	<input type="button" value="edit"/>	<input type="button" value="delete"/>

1 - 3 of 3

“Job Task” Pay Off

The screenshot shows a web-based interface for managing learning activities. At the top, there's a header 'Learning Activities' with search and navigation icons. Below that, a search bar contains 'Boardroom Basics' and a 'Clear' button. To the right are 'Save' and '+ Add Course' buttons. The main content area is titled 'Boardroom Basics' and contains a form with the following fields:

- Reference: MBA 102
- Category: Business Acumen
- Description: Understanding the drivers of supply chains and how they connect the business strategy to the supply chain execution.
- Type: Instructor Led - In Person
- Provider: Internal (selected), External
- Class Size: 24
- Catalog: On (selected), Off

Below the form, there are tabs for 'Detail info' and 'Related Skills'. Under 'Detail info', there are sub-tabs for 'Sessions', 'Learning Outcomes', 'Prework Assignments', 'Course Exercises', and 'Activity Materials'. A '+ New Session' button is located to the right of these sub-tabs. A table displays session information:

INSTRUCTOR	LOCATION	START DATE	END DATE	START TIME	END TIME	CLASS SIZE	ACTIVE
Ken Johnson	Atlanta Training Room	May 30, 2016	May 31, 2016	8:00 PM	4:00 PM	24	<input type="checkbox"/>
John	Baltimore Office	Jun 13, 2016	Jun 15, 2016	8:00 AM	5:00 PM	12	<input type="checkbox"/>

At the bottom of the table, it shows '1 - 2 of 2' and navigation arrows.

“Job Task” Pay Off

Accountability Reviews

Helayer, Raymond Save changes

Add/Edit Accountability Review

Employee: Helayer, Raymond

Reviewed by: Daou, Richard

Scheduled date: 06/23/16

Observed on: 06/01/16

Actual date: 06/23/16

Notes: Raymond is nailing it!

Accountability Factors

Accountability Factors	Scores (1=low; 5=high)			Action to be taken
	Employee	Manager	Both	
Customer base is expanding annually	5	5	5	n/a
Board of Directors are content	5	5	5	n/a

Load default factors

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Learning Activities

Boardroom Basics

Reference: MBA 102

Category: Business Acumen

Description: Understanding the drivers of supply chains and how they connect the business strategy to the supply chain execution.

Type: Instructor Led - In Person

Provider: Internal External

Class Size: 24

Catalog: On Off

Detail info Related Skills

Sessions Learning Outcomes Prework Assignments Course Exercises Activity Materials New Session

INSTRUCTOR	LOCATION	START DATE	END DATE	START TIME	END TIME	CLASS SIZE	ACTIVE
Ken Johnson	Atlanta Training Room	May 30, 2016	May 31, 2016	8:00 PM	4:00 PM	24	<input type="checkbox"/>
John	Baltimore Office	Jun 13, 2016	Jun 15, 2016	8:00 AM	5:00 PM	12	<input type="checkbox"/>

1 - 2 of 2

“Job Task” Pay Off

Accountability Reviews

Helayer, Raymond Save changes

Add/Edit Accountability Review

Employee: Helayer, Raymond

Reviewed by: Daou, Richard

Scheduled date: 06/23/16

Observed on: 06/01/16

Actual date: 06/23/16

Notes: Raymond is nailing it!

Accountability Factors

Accountability Factors	Scores (1=low; 5=high)			Action to be taken
	Employee	Manager	Both	
Customer base is expanding annually	5	5	5	n/a
Board of Directors are content	5	5	5	n/a

Load default factors

Learning Activities

Boardroom Basics

Reference: MBA 102

Category: Business Acumen

Description: Understanding the drivers of supply chains and how they connect the business strategy to the supply chain execution.

Type: Instructor Led - In Person

Provider: Internal

Class Size: 24

Catalog: On

Detail info

INSTRUCTOR	LOCATION	START DATE	END DATE	START TIME	END TIME	CLASS SIZE	ACTIVE
Ken Johnson	Atlanta Training Room	May 30, 2016	May 31, 2016	8:00 PM	4:00 PM	24	<input type="checkbox"/>
John	Baltimore Office	Jun 13, 2016	Jun 15, 2016	8:00 AM	5:00 PM	12	<input type="checkbox"/>

Add/Edit Performance Review

Employee: Helayer, Raymond

Task: Analyze a sales territory.

Observed on: 2016-06-01

Scheduled date: 2016-06-07

Actual date: 2016-06-07

Rating: BP

Address?

Notes:

Observations: As Raymond analyzes his territory, he uses websites and feedback from existing customers to target key areas and customer trends.

Cancel Save

“Job Task” Pay Off

Accountability Reviews

Helayer, Raymond Save changes

Add/Edit Accountability Review

Employee: Helayer, Raymond

Reviewed by: Daou, Richard

Scheduled date: 06/23/16

Observed on: 06/01/16

Actual date: 06/23/16

Notes: Raymond is nailing it!

Accountability Factors

Accountability Factors	Scores (1=low; 5=high)			Action to be taken
	Employee	Manager	Both	
Customer base is expanding annually	5	5	5	n/a
Board of Directors are content	5	5	5	n/a

Load default factors

Learning Activities

Boardroom Basics

Reference: MBA 102

Category: Business Acumen

Description: Understanding the drivers of supply chains and how they connect the business strategy to the supply chain execution.

Type: Instructor Led - In Person

Provider: Internal

Class Size: 24

Catalog: On

Add/Edit Performance Review

Employee: Helayer, Raymond

Task: Analyze a sales territory.

Observed on: 2016-06-01

Scheduled date: 2016-06-07

Actual date: 2016-06-07

Rating: BP

Address?

Notes:

Observations: As Raymond analyzes his territory, he uses websites and feedback from existing customers to target key areas and customer trends.

Cancel Save

Best Practices

Analyze a sales territory.

NAME	DETAILS
Analyze a sales territory.	
Apply a Line of Inquiry.	
Call prospective customers to collect information	
Call prospective customers to secure 1st appointments.	
Coach employees for job tasks performance improvement.	
Conduct employee job results reviews.	
Control the focus of a customer meeting.	
Create a customer Pursuit Plan.	
Create a Line of Inquiry.	
Create a Sales Business Plan for engaging a specific market area.	
Create the company vision.	
Engage Companies in the Assigned Sales Territory.	Territory segmentation and monthly planning.
Establish Initial Rapport.	
Evaluate and analyze employee job performance.	
Explain how our brilliant idea will improve customer revenue.	

1 - 15 of 31

“Job Task” Pay Off

Accountability Reviews

Helayer, Raymond Save changes

Add/Edit Accountability Review

Employee: Helayer, Raymond

Reviewed by: Daou, Richard

Scheduled date: 06/23/16

Observed on: 06/01/16

Actual date: 06/23/16

Notes: Raymond is nailing it!

Accountability Factors

Accountability Factors	Scores (1=low; 5=high)			Action to be taken
	Employee	Manager	Both	
Customer base is expanding annually	5	5	5	n/a
Board of Directors are content	5	5	5	n/a

Load default factors

Learning Activities

Boardroom Basics

Reference: MBA 102

Category: Business Acumen

Description: Understanding the drivers of supply chains and how they connect the business strategy to the supply chain execution.

Type: Instructor Led - In Person

Provider: Internal

Class Size: 24

Catalog: On Off

Add/Edit Performance Review

Employee: Helayer, Raymond

Task: Analyze a sales territory.

Observed on: 2016-06-01

Scheduled date: 2016-06-07

Actual date: 2016-06-07

Rating: BP

Address?

Notes:

Observations: As Raymond analyzes his territory, he uses websites and feedback from existing customers to target key areas and customer trends.

Cancel Save

Best Practices

Analyze a sales territory.

NAME	DETAILS
Analyze a sales territory.	
Apply a Line of Inquiry.	
Call prospective customers to collect information	
Call prospective customers to secure 1st appointments.	
Coach employees for job tasks performance improvement.	
Conduct employee job results reviews.	
Control the focus of a customer meeting.	
Create a customer Pursuit Plan.	
Create a Line of Inquiry.	
Create a Sales Business Plan for engaging a specific market area.	
Create the company vision.	
Engage Companies in the Assigned Sales Territory.	Territory segmentation and monthly planning.
Establish Initial Rapport.	
Evaluate and analyze employee performance.	
Explain how our brilliant ideas...	

Best Practices

NAME	TASK NAME	DATE OBJECT	DETAILS	OBSERVER NAME
Admin, System	Analyze a sales territory.	06/01/16	Observed via discussion and examples. Admin showed me how the websites he uses and how he interprets the data. Upon looking at the resulting territory coverage, analysis is deemed to be valid and properly used.	

All of the Basics

“Learning Events” Catalog and Registration

The screenshot displays a web-based interface for managing learning activities. The main header is "Learning Activities" with navigation icons. Below it, a search bar contains "Boardroom Basics" and a "Clear" button. To the right are "Save" and "Add Course" buttons.

The course details section for "Boardroom Basics" includes:

- Reference: MBA 102
- Category: Business Acumen
- Description: Understanding the drivers of supply chains and how they connect the business strategy to the supply chain execution.
- Type: Instructor Led - In Person
- Provider: Internal (with an External option)
- Cultivator: Cultivator
- Class Size: 24
- Catalog: On (with an Off option)

Below the details are tabs for "Detail Info" and "Related Skills". Under "Detail Info", there are sub-tabs for "Sessions", "Learning Outcomes", "Pework Assignments", "Course Exercises", and "Activity Materials". A "New Session" button is present.

The "Sessions" tab shows a table of sessions:

INSTRUCTOR	LOCATION ^	START DATE	END DATE	START TIME	END TIME	CLASS SIZE	ACTIVE
Ken Johnson	Atlanta Training Room	May 30, 2016	May 31, 2016	8:00 PM	4:00 PM	24	
John	Baltimore Office	Jun 13, 2016	Jun 15, 2016				

Page 1 - 2 of 2

The "Registration" section is overlaid on the bottom right, showing details for a specific session:

- Location: Atlanta Training Room
- Date: May 30, 2016 - May 31, 2016
- Time: 8:00 PM - 4:00 PM
- Cost: \$

The registration list table is as follows:

Name ^	Phone	Branch	Status	Registrant No	Notes
Amzil, Grid		Philadelphia	Registered	0	
Ardt, Richard		Philadelphia	Registered	0	
Ashburn, Steven		Philadelphia	Registered	0	

Page 1 - 3 of 3

All of the Basics

Candidate Searches and Career Planning

Job Candidates 🔍 ⏪ 📄 ⏩

Scharrer, Adrian Clear Save Add Candidate

Adrian Scharrer hide

Address

City **State**
Zip

Details **Contact Info** **Options**

Apply Date
Source

Skills Additional Info

Interviews **Achievements** **Prior Jobs**

INTERVIEW	LOCATION	DATE
First Interview	Baltimore Office	01/01/2013

1 - 1 of 1

Career Planning ⏪ 📄 ⏩

Jones, Mark ⏪ 📄 ⏩
Branch Manager ⏪ 📄 ⏩

Current Skillset hide

Skills **Knowledge** **Behavior**

Courses

NAME	REF
------	-----

Job Skillset hide

Skills **Knowledge** **Behavior**

Courses

NAME	REF
------	-----

Career Path hide

Skills **Knowledge** **Behavior**

Courses

NAME	REF
------	-----

THANK YOU!!

Ken Johnson – Cultivator, LLC

- “P.E.R.F.O.R.M. - Tools for the rest of us!”