BLOOM® Implementation Guideline

Introduction

Welcome to BLOOM!

Following is the recommended guideline for your BLOOM implementation. The system can be implemented by completing the following steps in the sequence specified. Each section includes instructions and highlights where we can import data for you.

Step 1: Enter Wage Scales (only required at this point if you want to monitor the wage analysis for all/some employees)
Step 2: Enter Training Classes and Programs (only required at this point if you are assigning required training to Roles)
Step 3: Enter Role Codes (required)
Step 4: Enter Employees (required) Individual development goals can also be entered at this step, however it is not required.
Step 5: Enter Company Initiatives (not required)

Click on the yellow Setup tab at the top of your screen to complete these steps and track your progress by marking each step complete on the left side as you go. Or access this setup checklist by clicking on the top Admin tab and click on Setup under the System submenu.

Before You Begin

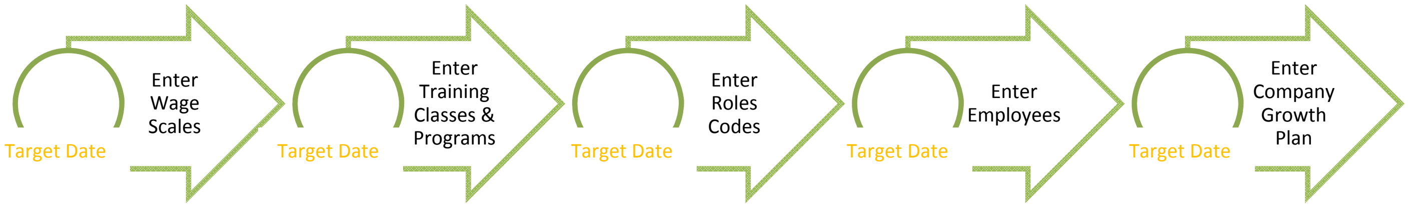
Let us assist you with keeping track of your progress. For no additional charge, our Implementation Consultant will work with you to customize the timeline below to establish your completion goals for each stage. We will contact you to check-in on your progress, as well as answer any questions that you have.

If you need help developing any aspects of the implementation sequence, we can assist you for additional fees. Our rates are reasonable and we will provide a Quick Quote based on the specific needs that you have.

Otherwise, just let us partner with you along the way with friendly reminders and check-ins to answer your questions and help keep the process moving to meet your goals.

The 5-step sequence provided here can be completed in as little as 2 weeks if you have your information ready to go. If you are developing your content along the way, we find clients complete the process easily within 30-60 days. In our introductory phone call we can help you establish realistic goals based on the areas you want to implementation and the current information that you have ready to go.

Set Your Implementation Goals!



How often do you wish for our BLOOM Implementation Consultant to call you?

- Weekly (day and time?)
- Monthly (day and time?)
- At the above milestones (day and time?)
- At the targeted completion date (day and time?)

For support questions along the way, email support@bloomware.com and we will swiftly respond. You may also call us at 574.970.1322.

Training

We offer one 2-hour phone/web conference training session for the BLOOM system with your initial engagement. You can have as many people present as you wish.

Additional training is offered for the following lengths and fees. If necessary, travel is not included.

- Additional 2-hour training sessions: $495 each
- 4-hour training including tips on employee goal setting and setting company growth initiatives: $795 for 4-hours
- Full-day manager training on BLOOM, conducting employee performance interviews, employee goal setting, and setting company growth initiatives: $1495 for full-day

Set Initial Perimeters

In our introductory phone call, we will ask you the following questions to setup your company perimeters. So be sure to have your answers ready.

- What Organization ID do you wish to use? This is the Organization ID that all employees will use upon sign in along with their individual unique login ID and password. We recommend you limit this to 6-8 characters.

- How often will you complete performance reviews? Every 90 days, 180 days or 365 days?
  A 90-day Introductory Review is automatically created upon the entry of a new employee. This question pertains to the frequency which you want next review due dates to be automatically created each time HR approves reviews completed by managers and their employees.

- Do you want your performance review forms to have a 3, 4 or 5 point rating scale?

- Which of the following criteria do you want managers and employees to rate on the performance review form? The review form is customized based on the following criteria for your company.
  - Work Relationships
  - Creativity & Initiative
  - Communication Skills
  - Role Knowledge (view training record)
  - Organization Standards
  - Core Values
  - Individual Goals (imported from the employee record)
  - Competency Review (imported from the role description)
  - Strategic Growth Plan Assignments
  - Pay Data (this can be turned on or off by role, giving managers the ability to view their employees' pay data)

  KRAs (Key Results Areas) are required to be a part of every performance review form. These are the essential role requirements imported from Role Description and they are the element that provides the most personalized review experience for employees and managers to discuss regarding job-related performance.

- Do you wish for employees and managers to receive email notifications when reviews, goals, training and company growth initiatives are due? Yes or no?

- Do you wish to customize the look of BLOOM to match your company colors and image? Yes or no?
  If yes, which color template do you want? Green, Orange, Red or Blue
  Will you provide a company logo (jpeg format)? Yes or no?

See the Settings link under the Admin System menu to self-select your selections for the questions above.

Once these answers are finalized, you are ready to complete the following steps!

Step 1: Enter Wage Scales

From the Admin tab or Setup screen click on the Wage Scales link.

You can import our template wage scale (see left menu link) as a starter or you can start from scratch and create your own. You are not required to utilize wage scales, however Admin and Executives will not be able to view the Wage Scale Analysis if wage scales are not created and assigned to Role Codes. Wage scales are assigned to Roles and not people in BLOOM.

To import our template wage scale as a starter: click Copy Wage Scales from BLOOM Library in the left menu. Click on the check boxes of those in the list that you want to copy. Assign the wage scale letter (per your existing wage scale sequence) which you want to assign the newly imported scale.

To create your own wage scale structure: click the Add Wage Scale link in the left menu bar. Specify the wage scale letter you want to develop and the next available level number will be automatically be assigned. Then, complete the name and qualification details that you wish to set in the detail edit screen. Be sure to click Update at the bottom of the screen to save your changes. Complete this step for each wage scale and level that you wish to create.

- A wage scale is determined by the letter of the alphabet. (A, B, C, D…) Each scale needs to be assigned either an hourly or salary wage metric.
- A wage level within a scale is determined by a number. Each wage scale can have multiple levels (i.e. A1, A2, A3, A4, A5…) Or a wage scale can comprise of only one level. (A1, B1, C1…)

Once your wage scales and levels are defined, you are ready to complete the next step.

If you need help determining your wage scales, please contact us at support@bloomware.com or call 574.970.1322.

Step 2: Enter Training Classes & Programs

Training Classes and Programs (Programs comprise of multiple Classes) are training and development offerings that the organization has approved to make available to employees and their managers for assignment to improve performance. The Organization Files area in the Admin tab includes a training approval form if you wish to make it available to managers and employees to request specific Classes and Programs.

Upon approval and entry into BLOOM, Training Classes and Programs can be assigned to employees three different ways:

1. Automatically assigned to an employee Training record via the assignment of an approved Role Code with predetermined Training requirements for the position.
2. Assigned ad-hoc by the employee's manager or HR as requested.
3. Request by an employee with HR approval. This will be a new feature in Fall 2010.

At the time of implementation, if you do not wish to assign Training Classes and Programs to Role Codes as required or suggested training for a position, you can add Training to Role Codes later or assign training later on an ad-hoc basis. To later assign required training to a Role Code, you will need to create a new Role Code Revision to open the Role Code and assign the Training. Upon Role Code approval the Training will appear in all employee training records that hold that position.

To Enter Classes: Click the Admin tab and click Classes under the Training submenu. Click Add Class and complete the detail screen for the Class. Class hours and credits will be automatically calculated for each employee upon completion of the Class. Click Update at the bottom of the screen to save your information.

To Enter Programs: Click the Admin tab and click Programs under the Training submenu. Click Create Program and complete the detail screen for the Program. Select the Classes from the drop down that you entered in the previous to step to assign them to the Program. Click Update at the bottom of the screen to save your information.

Training Categories can be customized under the System Codes area in the Admin tab.

To Schedule Classes: Click the Admin tab and click Classes user the Training submenu. Click the category of the Class that you want to schedule on the left menu. Click on the Class name you want to schedule. Then click Schedule on the left menu. Complete the Schedule Detail screen for the Class and click Update at the bottom of the screen. The Class will now appear in the company Training Schedule (under the Organization tab) for employees to view.

Upcoming 2010 additions will include the ability for employees to sign up for Classes. This will create a signup observation and approval page for HR to monitor classes of interest and notify employees that they are approved to attend specific Classes.

Special Note: Some clients utilize the Training Class and Program Module as a task (using Classes) or process (using Programs) request for employees to complete. Examples may include benefit renewal processes, or review of new company policies, procedures, or protocols.

Step 3: Enter Role Codes

Role Codes & Descriptions are the same as job descriptions. BLOOM houses all aspects of a Role Description in a dynamic database format so that data can be retrieved from various parts of the system, such as performance reviews. The entry of Role Codes is easy using our pre-populated Role Description Wizard.

Note: We will auto-populate Role Descriptions for you if you provide Role information in the Excel worksheet format that we require. Contact your BLOOM Implementation Consultant for the template.

Also, we have a library of over 150 Role Descriptions for common position titles. Contact your BLOOM Implementation Consultant for a list and we will import those you need at your request.

To enter Role Codes: Click on <u>Role Codes</u> under the <u>Role Codes</u> submenu within the <u>Admin</u> tab. Select <u>Create New Role</u> from the left menu. Complete the information on the header screen. Click <u>Update</u> at the bottom of the screen.

Important: If you want to quickly approve Role Codes as you enter them, enter Role Descriptions in order of sequence starting with the highest ranking person in the organization (top down sequence). This will populate the drop down field “Reports To” on the Role Profile Header page. Or if you choose to approve Role Codes later, just be sure to approve completed Role Codes in order of hierarchy so they are available in the “Reports To” field to select.

Role Description Wizard Pointers:

- On the Header screen, be sure to select the position that the Role reports to in order to activate the Organization Chart in the Organization tab. If you have not yet entered the supervisory role, it will not appear in the drop down box for assignment.
- Click <u>Update</u> at the bottom of every screen when it appears to save your entries.
- Assign categories for each KRA (Key Result Area). This will assure that bullets assigned to each category are grouped for a category rating in the performance review. Otherwise, all KRAs will be grouped in a non-classified category and will require only one rating for KRAs in the performance review.
- To add items to the pre-populated lists, scroll down and enter your addition in the blank box and click <u>Update</u>.
- The Education and Skills menu items in the Wizard require a two step process. Complete both steps to add requirements to your Role Description.

- Upon completion of your Role Descriptions, they must be approved using the Approval link found on the left menu in order to be activated and accessible to assign them to employees.
- Multiple revisions will be stored for each Role Description. Until approved, pending Roles will not be viewable by anyone except Administrators. Only the Active Role is live throughout the system.

Step 4: Enter Employees

Entering employees is easy. Once an employee is entered, their complete record is setup and ready to go along with the launch of their first performance review.

Note: We will pre-populate employees for you at no charge if you provide their information in our required Excel spreadsheet format. Contact your BLOOM Implementation Consultant for the template.

To Enter Employees: Click on the Employees link under the Organization submenu of the Admin tab. On the left menu, click New Employees. Complete the ten requested fields and click Update. Your new employee is entered and ready to go. If you are manually entering employees, enter them in order of hierarchy in the organization. Executives, Managers and Supervisors need to be entered in the system before they can be assigned as supervisors to employees in the New Employee setup screen.

To Enter Employee Goals: After employees are entered, you are able to access their main menu by clicking on Employees and a specific employee name under the Admin tab. Then click on Goals in the Employee Main Menu. Click on New Goal to open a Goal Detail page. Complete the details and click Update to save. You can add as many Goals as you wish for each employee.

Note: Each Goal has a Goal Notes tab. This is where the manager and employee can add notes to a particular Goal to track achievements and progress.

To Weigh Employee Goals: After you enter an employee's Goals and if you have more than one, you are able to distribute a % weight to each goal (all not to exceed 100% total). In the employee's Goal menu on the left, click Assign Goal Weights. Choose the percentage weight for each goal (you cannot exceed and must equal 100%.)

Active and recently closed (since the last review) Goals and weights are imported into each employee's performance review form. The manager and employee rate each Goal and the weights are applied to calculate the section rating.

Step 5: Enter Company Growth Initiatives

The last step, Company Growth Plan Initiatives is entered in the following tiered structure:

1. Initiatives – these can be titled by Company Growth Initiative or Department
2. Objectives / Milestones
3. Goals / Projects
4. Action Steps / Tasks

Utilize the Add or Delete links on the left menu to create as many entries at each level. We can provide an example template if you are struggling with how to organize your plan.

Code Values

All drop down and selection lists throughout BLOOM are customizable. Under the Admin System menu select Codes to access the menu of customized drop downs and select lists in the system. Add a separate item to each text field and select Add New Code to add your options.