Clearvale TeamWork

Quick Start

BroadVision®

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Contents

1 Introduction to Teamwork

BroadVision Teamwork provides the framework to put together a well-aligned set of goals, tasks, and activities from top-down and bottom-up, across geographies, and on a quarterly, monthly, weekly, or daily basis.

Teamwork provides an easy-to-use, collaborative environment that allows team managers and individual contributors to:

- Plan goals, tasks, and activities periodically
- Align goals, tasks, and activities from both top-down and bottom-up
- Collaborate to identify and remove bottlenecks
- Align and optimize the use of resources
- Track goal, task, and activity attainment and tie it back to compensation

For all levels of management, Teamwork provides a work orchestration layer on top of conventional project management tools (such as Microsoft Project) and enterprise applications (such as CRM or ERP systems).

For individual contributors, Teamwork provides:

- Big picture view that aligns individual contributions
- Work process framework for learning best practices
- Collaborative environment for projects

Setting Up a Teamwork Plan

The team executives perform these steps once every quarter or month:

Step 1: Defining a Teamwork Plan explains how to use Teamwork to outline the high-level goals for the time period.

Step 2: Defining and Assigning Goals explains how to define and assign goals for each deliverable to team managers and individual contributors.

Step 3: Defining Tasks and Activities describes how team managers define tasks and activities for the selected time period.

Step 4: Updating Tasks and Activities explains how team managers and individual contributors track the completion of tasks and activities.

Step 1: Defining a Teamwork Plan

The first step is to define a Teamwork plan that specifies the overall period for evaluation and then set the checkpoints for the plan.

Teamwork plans can be created on the network or community level. If your project plan is global and extends across your organization, you may want to create a Teamwork plan on the network level. For project plans that do not span across departments, consider creating a Teamwork plan on the community level.

To define a Teamwork plan

1. Log into your Clearvale network as a network administrator or community owner.
2. If you have not already done so, add the Teamwork Plans widget to the network home page or community page, depending on the type of plan you are creating.
3. In the Teamwork Plans widget, click **More**.

   The Teamwork window opens and the My Teamwork Plans page appears.
4. Click **Create New Plan**.
5. Specify the details of the plan:
   - A name, such as `Omni 2009 Q4` where `Omni` is your company name, `2009` is the current year, and `Q4` is the time period for the plan.
   - A start date and end date, such as the first and last days of a quarter.
   - Plan status: Use **Active** for active plans and **Archive** for a past plan.

     NOTE: An archived plan will not be visible in **My Objectives** and you cannot add goals to it.
   - Shared or not:
     - If the setting **Is Shared** is set to **Yes** and the work plan is created from the network, then all network members can access the plan and view which assignments are assigned to whom.
     - If the setting **Is Shared** is set to **Yes** and the work plan is created from the community, then all community members can access the plan and view which assignments are assigned to whom.
     - If the setting **Is Shared** is set to **No** and the work plan is created from the network, then only network members selected from the **Share Plan** tab can view which assignments are assigned to whom.
     - If the setting **Is Shared** is set to **No** and the work plan is created from the community, then only community members selected from the **Share Plan** tab can view which assignments are assigned to whom.

     This *Quick Start* assumes that you have set the plan to **Is Shared**.
   - Show on Home Page setting. Check this box if you want your Teamwork plan to show up on the home page of your network.
   - Any optional notes.
   - Click **Save and Next**.

   The Plan Checkpoint page appears.

6. Define the checkpoints for your plan.

   The checkpoints are when you will review status on goals, tasks, and activities. For example, you might want to select **Monday** of every **2** weeks for recurrent checkpoints.

7. Click **Generate Checkpoints**.

8. Click **Save**.

   Click **Complete** to display the Goal Management page where you define goals and tasks for your plan.

Step 2: Defining and Assigning Goals

The next step is to define a well-aligned set of top-level and subgoals. For example, the following is an abbreviated goal framework for a software company:

Domain	Number	Goal
Sales	1	Revenue
	1.1	New customers
	1.1.1	North America
	1.1.2	Other regions
	1.2	Renewals
	1.2.1	North America
	1.2.2	Other Regions
Marketing	2	Marketing
	2.1	Corporate marketing
	2.2	Field marketing
Engineering	3	Engineering
	3.1	Product A
	3.2	Product B

To define and assign goals

1. Click **My Objectives** in the Teamwork window.

   The Goal Management page appears.

2. From the drop-down, select the appropriate Teamwork plan.

   For example, **Omni 2009 Q4**.

   When you create a new plan, a placeholder top goal is provided for you.

3. Double-click the placeholder **Top goal** and define it as a top-level goal for your plan.
   - Change the goal name. For example, `Revenue`.
   - Use the **Ellipsis** button to select an **Assignee**. You are the assignee by default.
   - Use the **Ellipsis** button to select a **Reviewer**. You are the reviewer by default.
   - Click **Start Date** to enter a start date for this specific goal.

- Click **Due Date** to enter an end date for this specific goal.
- Use the default weight of `10` (see Using Weight).
- Click **Save and Close**.

4. Add a subgoal to your top-level goal.
   a. Select the top-level goal, for example, `Revenue`.
   b. Right-click to display the context menu and select **Add Subgoal...**.
      - Enter a goal name, such as `New customers`.
      - Use the **Ellipsis** button to select an **Assignee**. You are the assignee by default.
      - Use the **Ellipsis** button to select a **Reviewer**. You are the reviewer by default.
      - Click **Start Date** to enter a start date for this specific goal.
      - Click **Due Date** to enter an end date for this specific goal.
      - Use the default weight of `10` (see Using Weight).
      - Click **Save and Close**.

5. Add a sub-subgoal and assign it to another owner.
   a. Select the subgoal you created previously, for example, `New customers`.

      TIP: Click on the **Plus** sign to expand a top-level goal and display its subgoals.
   b. Right-click to display the context menu and select **Add Subgoal...**.
      - Enter a goal name, such as `North America`.
      - Use the **Ellipsis** button to select an **Assignee**. You are the assignee by default. Change the assignee to the appropriate user.
      - Use the **Ellipsis** button to select a **Reviewer**. You are the reviewer by default.
      - Click **Start Date** to enter a start date for this specific goal.
      - Click **Due Date** to enter an end date for this specific goal.
      - Use the default weight of `10` (see Using Weight).
      - Click **Save and Close**.

Using Weight

Weight reflects the importance between the same level goals and tasks. If you want all goals and tasks to have the same importance, enter the same weight values. These goals and tasks will be properly weight averaged during the bonus calculation at the end of the quarter. If you have two tasks, and one is twice as important as another, weight the first task 20 and the other task 10.

Step 3: Defining Tasks and Activities

The next step is to define and assign the tasks. A task is a unit of work that produces results that can be independently delivered and verified.

Here are some sample tasks based on the domains defined earlier.

Domain	Sample Tasks
Sales	Track deal
	Make calls
	Identify contacts
	Prepare demonstrations
	Prepare presentations
	Prepare proposals
	Negotiate terms
	Sign contract
	Collect payment
Marketing	Create collateral
	Plan events
	Execute events
	Publish press release
Engineering	Track project
	Collect requirements
	Analyze requirements
	Design features
	Implement features
	Test features
	Document features
	Release features

To define tasks and activities

1. Select **My Objectives** in the Teamwork window.
2. From the drop-down list, select the appropriate Teamwork plan. For example, **Omni 2009 Q4**.
3. Select a goal and right-click to display the context menu; select **Create task**.

   The Goal/Task Detail page appears.
4. Define the task:
   - Enter a name, such as `Track deal: Acme, Inc.`
   - Enter start and due dates for the task.
   - Assign a weight; `5` is the default.
   - Click the **Ellipsis** button next to **Assignee** and select the individual contributor to whom to assign the task.
5. Click the **Activity** tab to enter the activities for the current period:

   a. Click the plus icon. A row displays.

   b. Enter your activity in the row. For example, you might enter `Qualify deal`.
6. Click **Save and Close**.

The person assigned to the activity will check it off as it is completed.

Step 4: Updating Tasks and Activities

Every period, the individual contributor can check off the activities of the previous week. The team manager (or individual contributor) defines the activities for the following week until the task is complete.

To mark a task as complete

1. Log in as an individual contributor.
2. Select **My Objectives** in the Teamwork window.
3. From the drop-down list, select the appropriate Teamwork plan. For example, **Omni 2009 Q4**.
4. Right-click in the **Status** field for the task and select **Completed** from the drop-down menu.

To update progress on tasks and activities

1. Log in as an individual contributor.
2. Select **My Objectives** in the Teamwork window.
3. From the drop-down list, select the appropriate Teamwork plan. For example, **Omni 2009 Q4**.
4. Double-click the task.

   The Goal/Task Detail page appears.
5. Update your progress:
   - If you completed an activity, click the **Activity** tab and check the box next to the activity that is complete.
   - If you are mid-way through a task, click the **% Complete** tab and move the **% Complete** progress dial to the current completion percentage. For example, you might move the progress dial to `10%`. In the next checkpoint period, move the **Plan % Complete** progress dial to the current completion percentage.
6. Click **Save and Close**.

   NOTE: You can only modify the **% Complete** progress dial for a checkpoint when you are currently in that period.