



# Performance Planning

*Improve service delivery through better planning and decision making*

## Why is Planning Important?

Measuring risk and sustainability practices has become a key aspect of performance management for organisations that are committed to delivering results for their internal and external stakeholders.

TechnologyOne Performance Planning is a purpose-built solution to document, manage and report on all aspects of strategic and operational planning, including risk and sustainability issues. TechnologyOne Performance Planning ensures plans are aligned; from strategic, outcome-focused objectives to operational, output activity based projects and services, for total corporate stability.

Organisations have an extensive array of requirements for their planning processes. They need to consider a multitude of plans and horizons – strategic, operational, long term and short term. The plans reflect their unique entities - organisation structures, outcomes, outputs, programs, services, actions and tasks.

Related processes such as governance, audit, issue, risk and project management are integrated with these entities to provide a comprehensive corporate performance management framework that addresses your organisation's risk and sustainability practices. Roles and responsibilities are assigned to these elements to ensure accountability. Performance Planning enables these complex structures and processes to be captured and presented in logical, role-based views.

## Best Practice Performance Management

Monitoring and reporting is a key factor in achieving sustainable and continuous improvement. TechnologyOne Performance Planning, implemented with TechnologyOne Business Intelligence, is a total corporate performance management solution that addresses both your financial and operational activities. Performance Planning facilitates a set of integrated, iterative management and analytical processes to enable organisations to define strategic goals, outcomes and inputs, and then measure and manage performance against them according to the organisation's requirements.

TechnologyOne's state-of-the-art reporting and analysis capabilities provide a rich variety of outputs. Users can select from a variety of standard and ad-hoc reports and dashboards, and can easily develop and publish additional traffic light and graphical views.

As part of the strategic feedback loop and ongoing planning cycle, organisations undergo a benefits realisation analysis. This performance "post mortem" provides the organisation with an opportunity to understand the causes of under or over-achievements, and apply that knowledge to the future. TechnologyOne Performance Planning highlights these variances and ensures that this knowledge is captured together with associated recommendations for input into the next planning cycle.



*The unique TechnologyOne dashboard personalises the user experience. Through a series of easy to identify traffic lights, problems are quickly highlighted and can be dealt with instantly.*



**technologyone**  
business software solutions



## The 10 Benefits of TechnologyOne Performance Planning

### 1. Document your organisation's unique vision and strategic objectives

Planning templates, such as the Quadruple Bottom Line approach, can be used to rapidly deploy the application. Users can customise their plans to reflect differences in their terminology, scale, timeframes and structure.

### 2. Align planning activities and strategic goals

All activities are linked to relevant plan components such as outcomes, outputs, business units, services and projects. Cumulative financial and non-financial performance is consolidated to reflect summarised performance at all levels.

### 3. Apply rigour to performance measurement

A variety of qualitative and quantitative performance measures track your team's achievement of activities and targets. Measure outcomes by effectiveness targets and outputs by efficiency KPI's.

### 4. Achieve quality project management and service delivery

Projects can be configured using industry standard methodologies such as PMBOK and Prince2. Users can review performance against deadlines and targets, and monitor subsequent actions and tasks.

### 5. Encourage accountability for achievement of targets

Empower individuals to record and measure the activities for which they are responsible, against agreed organisation expectations. Managers can review and add further comments as part of an approval process.

### 6. Enable focused reporting and analysis

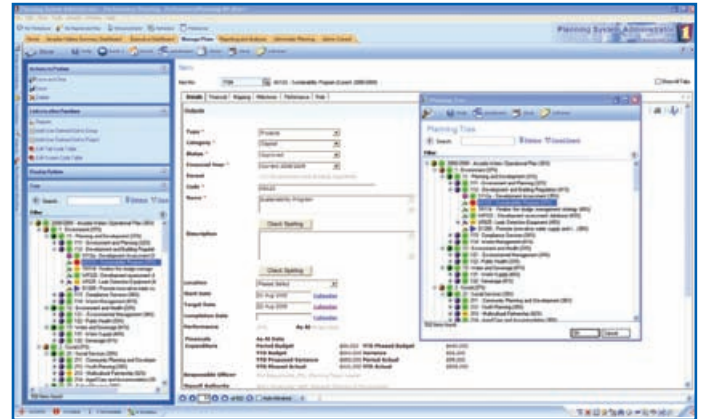
In addition to the set of standard reports, users can create and run ad-hoc reports and perform analysis using portlets, dashboards, drill-downs and graphical displays.

### 7. Foster a culture of continuous improvement

Improve your organisation's knowledge management through feedback loops and post mortems. Improve staff capability and leverage investment in existing corporate IT systems.

### 8. Seamless integration with TechnologyOne solutions

Performance Planning integrates with other TechnologyOne solutions so that relevant data is automatically extracted and updated.



TechnologyOne Performance Planning enables you to strategically define your organisational goals

### 9. Intelligent integration with external systems

Performance Planning integrates with external systems so that data can be easily imported or exported from or to Microsoft Office applications. KPI data can be automatically extracted and updated into Performance Planning from any external system.

### 10. Preparing for Corporate Sustainability

A logical extension to any contemporary performance management strategy is to understand your impact on the environment and the sustainability of the resources being used. Performance Planning is enabled to assist with this process and provide a consistent approach to all forms of measurement.

Code	Name	Budget	Planned	Current	Actual	Comments	No. of Activities	Start Date	Target Date	Performance	Responsibility
<b>December 2008 - Arcadia Waters Operational Plan</b>											
<b>Arcadia Waters Operational Plan</b>											
<b>Environment</b>											
<b>Planning and Development</b>											
<b>111 Environment and Planning</b>											
111001	No Planned Activity	0	0	0	0	0	0	0	0	0%	0
111002	Targeted	2,200,000	2,200,000	2,200,000	2,200,000	0	0	0	0	100%	0
111003	Not on Target	0	0	0	0	0	0	0	0	0%	0
<b>112 Development and Building Regulation</b>											
112001	No Planned Activity	0	0	0	0	0	0	0	0	0%	0
112002	Targeted	2,964,000	150,000	1,164,000	2,710,000	0	0	0	0	91%	0
112003	Not on Target	0	0	0	0	0	0	0	0	0%	0
<b>113 Compliance Services</b>											
113001	No Planned Activity	0	0	0	0	0	0	0	0	0%	0
113002	Targeted	4,700,000	401,700	5,017,700	4,710,000	0	0	0	0	98%	0
113003	Not on Target	0	0	0	0	0	0	0	0	0%	0
<b>114 Waste Management</b>											
114001	No Planned Activity	0	0	0	0	0	0	0	0	0%	0
114002	Targeted	2,004,000	200,200	2,174,200	1,800,000	0	0	0	0	90%	0
114003	Not on Target	0	0	0	0	0	0	0	0	0%	0

Graphical and tabular exception reports highlight variances from the plan.