

Case Study for Southern College of Optometry

Highly Customized Performance Management System



Technology. People. Growth

How Empxtrack Performance Management System
Meet the Unique Customization and Integration
Needs of Southern College of Optometry

"Southern College of Optometry has successfully automated our performance management system with Empxtrack as our partner. They have provided us with customized online tools for both our introductory and annual review processes. We have enjoyed the support of a dedicated and responsive Account Manager who provides ongoing virtual training to our system administrators. Because the Empxtrack platform is integrated through ADP, data management is streamlined and our HR team can spend time on the more important and value-added aspects of our job over the typical administrative burdens associated with performance management."



TRACY B. LINDOW, Executive Director of Human Resources,
Southern College of Optometry

The case study is about an international optometry institute that was looking for a highly customized performance management system. The client was already using ADP payroll and needed a performance management tool that could be easily integrated with it.

Southern College of Optometry (SCO) was using a performance appraisal system from another vendor and they were unable to meet the complex appraisal process and customization requirements of the college.

Empxtrack was listed on ADP marketplace and could be easily purchased and integrated with ADP Payroll. Hence, SCO finalized the Empxtrack performance management system for both their introductory and annual review processes.

ABOUT CLIENT

Southern College of Optometry is committed to prepare future generations of optometrists to serve patients and diverse communities in the United States and around the world. Our client has a mission to lead the profession by:

- » Educating the best possible healthcare providers
- » Promoting lifelong learning and
- » Fostering a personal commitment to service

Since SCO's founding in 1932, the college has benefited from outstanding leadership who works side by side with employees to meet the college's mission.

THE NEED

The client was already using ADP appraisal to map their performance evaluation requirements. Lack of integration capabilities and customization in the existing appraisal solution led to tedious and inaccurate employee reviews. The appraisals were delayed, and college faculty was dissatisfied.

Hence, our client needed easy-to-use, sophisticated yet highly customizable performance appraisal and goal setting solutions that could simplify their unique evaluation approach. A customized performance management tool that could easily integrate with ADP and increase transparency and objectivity in the evaluation process.

THE CHALLENGE

The Southern College of Optometry had a set of unique appraisal forms and attributes for multiple groups of employees. They faced challenges in mapping their unique needs such as: showing multiple types of ratings on one form, presenting different attributes on a single form, uploading files to support appraisal ratings, and having well-defined ratings for each attribute.

The institute wanted to soon implement a cloud-based performance management software to overcome all the above issues. They wanted to simplify appraisal and goal setting for their faculty members.

The client faced a lot of difficulty in finding an integrated, customizable, yet simple performance management system. Due to complex customization requirements, their existing appraisal solution could not meet client's expectations.

THE SOLUTION

After evaluating multiple performance management products on ADP marketplace, the college selected Empxtrack performance management solution. Thereafter, the Empxtrack team got in touch with the client to understand their concerns.

Empxtrack offered integration capabilities and multiple customization options to the client. After a few demos, SCO could easily identify the depth of customizations and configurations offered by Empxtrack. The optometry institute saw it as a flexible yet sophisticated performance management tool that could meet their requirements.

Soon the solution was implemented with multiple promising features:

1. Multiple attributes (leadership and non-leadership) on a single form Empxtrack provided a faculty evaluation form that consisted of leadership and non leadership attributes. It became more meaningful to rate performance of the faculty members based on leadership and non-leadership qualities.
2. Qualitative and quantitative ratings on single form Empxtrack provided an appraisal form with two types of ratings, i.e. quantitative and qualitative ratings. Managers could now easily provide ratings in both the types.

	A	B	C	D	E	F	G	H
1	Leadership	TE AVG	QW AVG	LDSHP AV	SCHOL	SERVICE	Professionalism? Meets/Does Not Meet	FINAL SCORI
2	Y	5.5	5.7	5.8	0	3	Does Not Meet	5
3	N	5	5	0	2	6	Does Not Meet	4.5
4	Y	5.4	5	5	0	5	Does Not Meet	5.1
5	N	4.7	5	0	5	6	Does Not Meet	5.17
6	Y	5	5.2	5	0	3	Does Not Meet	4.55
7	N	5	5	0	3	5	Does Not Meet	4.5
8	N	5	5.2	0	6	5	Does Not Meet	5.3
9	Y	5.1	5.3	5.2	0	6	Does Not Meet	5.4
10	N	4.4	4.1	0	5	6	Does Not Meet	4.88
11	Y	5.1	5.2	5.4	0	6	Does Not Meet	5.43
12	N	5.1	5	0	3	6	Does Not Meet	4.78
13	N	4.5	4.6	0	5	4	Does Not Meet	4.53
14	N	4.9	5	0	3	5	Does Not Meet	4.47
15	N	5.1	5.1	0	4	5	Does Not Meet	4.8
16	N	5	5.1	0	4	7	Does Not Meet	5.28
17	N	4.8	5	0	0	0	Does Not Meet	2.45
18	N	5.1	5.3	0	6	6	Does Not Meet	5.6
19	N	4.8	4.5	0	4	3	Does Not Meet	4.08
20	N	5.1	5.3	0	4	4	Does Not Meet	4.6
21	N	4.9	5.2	0	5	4	Does Not Meet	4.78
22	Y	5.1	5.1	5.2	5	0	Does Not Meet	5.1
23	N	4.7	4.8	0	3	5	Does Not Meet	4.38
24	N	5.3	5.1	0	4	3	Does Not Meet	4.35
25	Y	5.1	5.3	5	0	6	Does Not Meet	5.35

Image: Quantitative and qualitative ratings for faculty members in leadership and non-leadership roles. The numbers indicate quantitative rating and “Does Not Meet” indicate qualitative rating.

3. Upload utility in appraisal form Empxtrack gave the option that a file or document could support rating for an attribute. Managers thus found it easy to justify the ratings with their detailed feedback or by showing a piece of work.

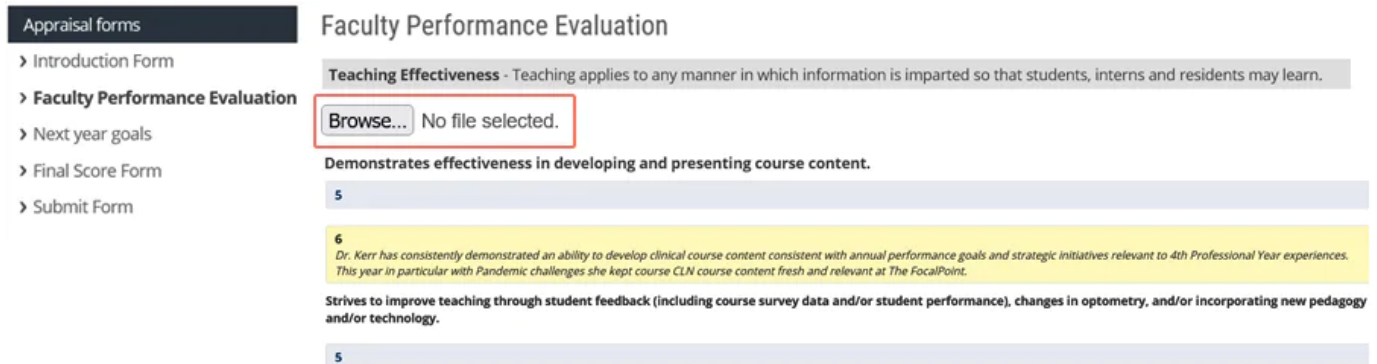


Image: upload utility in faculty appraisal form

4. Well-defined rating for each attribute Each attribute could be rated from low to high. Empxtrack made it easier for the employee and managers to understand what each rating scale indicated. A detailed description for each rating scale was mentioned on the manager evaluation form.

Quality of work:				
Embraces excellence by setting high work standards and consistently achieves positive results relative to accuracy, timeliness and thoroughness, self-motivated and works with minimal direction. Looks for ways to improve methods/procedures.				
Unsatisfactory	Needs Improvement	Fully Competent	Exceeds Expectations	Distinguished
Performance in this competency category does not meet the expectations of the position. May indicate a need for additional training and/or a formal Performance Improvement Plan.	Performance related to this competency may have been successful on some occasions, but frequently fails below expectations and requires improvement.	Consistently meets the basic expectations for the position in this competency category	Frequently exceeds and provides significant and measurable contributions well beyond their position responsibilities for this competency.	Consistently exceeds expectations for this competency category. Management and colleagues recognize their excellence and their unique contributions. Employees serve as a role model within the institution in this competency.

Image: View detailed description of each rating mentioned on the table

IMPACT

Southern College of Optometry successfully automated their performance management system with Empxtrack as their partner. Empxtrack provided a highly customized, fully integrated yet easy-to-use performance management system to the client. Performance evaluations were simplified with Empxtrack's custom features and maximum configurability options. The performance management system helped the client in several ways:

- ❖ Tons of customization options gave flexibility to meet exact needs
- ❖ Customized online tool helped in both introductory and annual review process
- ❖ Easy integration with ADP eliminated the data errors and streamlined data management
- ❖ Comprehensive reports helped in analyzing appraisal scores for multiple employee groups
- ❖ Dashboards offered real time monitoring of the process
- ❖ Inaccuracies were reduced and bias was eliminated from the process
- ❖ Employee development needs could be easily identified
- ❖ Performance management process was made more meaningful and transparent
- ❖ Increased employee engagement and productivity
- ❖ HR was relieved from the administrative tasks and could invest more time on strategic initiative

Check out more Benefits of using Empxtrack.

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