Plateau Overview from 5.5 to 5.8

September 2007

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Plateau Learning

- LMS
- Virtual Learning
- Team Content

Competency Management

Plateau Performance

- Performance Appraisals
- Goals Alignment
- 360 Multi Rater
- Career Planning (IDP)
- Succession Planning

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V5.8 Foundation

▸ The Plateau Foundation provides core capabilities available for Plateau Learning and Plateau Performance:

- Competency Management

  - Drives individual and organizational performance by managing and evaluating employee skills, knowledge, abilities and behavior against expected requirements.

  - Effectively leverages competencies for the overall benefit of the organization through benchmarking, goal setting and tracking.

  - Provides individual mastery level requirements by competency.

- Skills Inventory

  - Provides visibility to employee skills and identifies qualified candidates for special projects or new assignments.

  - Each skill may have a knowledge or proficiency rating (e.g., beginner, intermediate) and experience level rating (e.g., 1-3 years, 4-6 years).

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Customer Migration through Plateau Capability

- ▶ Establish LMS
  - Blended Content, Curriculums
  - SF 182 and EHRI

- ▶ Competency Management (360 assessment, IDP/Career)
  - Develop Competencies, Map to jobs and training items, Map to Career Paths
  - Develop assessment survey and process
  - Develop IDP based on competency gaps
  - Optionally add ability for Organizational Alignment on Initiatives/Goals
  - Optionally add ability to utilize competency, assessment and IDP to provide information for Succession Planning

- ▶ Performance Management (Goals Alignment, Performance Appraisals, Compensation Management)
  - Performance appraisal process
  - Performance Rating
  - Compensation Management

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Significant New Capabilities

Plateau Performance "builds well on the company's strengths in enterprise learning management and will help organizations develop an integrated performance-centric approach to workforce management."

- Josh Bersin, Principal, Bersin & Assoc

▶ **Plateau Learning**
- Plateau LMS - ENHANCED
- Plateau Virtual Learning System - ENHANCED
- Plateau Team Content LCMS

▶ **Plateau Performance**
- Plateau Performance Goals & Appraisals – NEW
- Plateau Goals Alignment – NEW
- Plateau Multi-Rater – ENHANCED
- Plateau Career & Development Planning – ENHANCED
- Plateau Succession Planning – ENHANCED

▶ **Plateau Analytics** – ENHANCED

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LMS v5.8 – *Highlights*

▸ Curricula and Catalog Enhancements

▸ Usability Improvements

▸ New Administrator Tools

▸ SCORM 2004 Certification

▸ SF-182 Updates

▸ Exam Item Analysis Report

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LMS v5.8 – *Curricula Enhancements*

▸ **Rules-based Curricula**

- Provides enhanced configuration of learning requirements by supporting elective-style training.

- Curricula completion can be specified based on a multiple evaluation requirements.

- Allows users to complete a subset of items from a group, a certain number of credit hours, or any combination of these.

▸ **Self-assigned Curricula**

- Users may search and add curricula and items to their learning plans, empowering them to take charge of their own learning and reducing admin time of assigning curricula.

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LMS v5.8 – *Catalog Enhancements*

▸ **Catalog Access**

– Assignment profiles now set catalog access, so it can be based on any user attribute such as job position, region, hire date, or a custom field

▸ **Regional Search**

– Streamlines searches by enabling users to limit their catalog search to offerings specific to their region.

▸ **Item Retirement ("Sunsetting")**

– Provides item expiration dates, after which it will automatically be removed from the catalog.

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LMS v5.8 – *Usability Improvements*

▸ **Quick Links**
Provides workflows to complete common tasks, such as 'Record Learner' and 'Create Learning Item', in a simpler and quicker manner.

▸ **Search Builder**
Administrators can customize search criteria, display of results, and sorting order to quickly identify key information

▸ **Saved Search Criteria**
Save any search criteria for future use.

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LMS v5.8 – *Administrator Tools*

▸ **Ad Hoc Notifications**

 – Administrators can send users notifications on an 'as needed' basis.

▸ **Deep Linking**

 – Users can proceed directly to a page in the application from a notification or external web page, streamlining their workflow.

▸ **User Merging**

 – Merge two or more user accounts into one, reducing redundancy.

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LMS v5.8 – *Exam Item Analysis Report*

▶ **Detailed exam information**

- – number of learners asked each question

- – number of responders per distractor

▶ **Improves test quality**

- – enables designers to statistically determine if a question is too easy or hard.

Exam Item Analysis Definition	
Exam:	Infection Control
Description:	This exam is to test the student's knowledge of infection control.
Total Learners:	5

Question

Question ID:	12
Responses:	6
Description:	Which of the following is a type of Protozoa infection?
Question Type:	MULTI_CHOICE_SINGLE_ANSWER
Number:	1
Version:	1
Revision:	2
Stem:	Which of the following is a type of Protozoa infection? [image]

Distractors

Distractor Text	Responses
Malaria	2 (Correct)
Lyme Disease	0
Pneumonia	2
Common Cold	1
	1 (Omissions)

Question

Question ID:	13
Responses:	6
Description:	Which of the following is NOT a nonspecific immune defense?
Question Type:	MULTI_CHOICE_SINGLE_ANSWER
Number:	1
Version:	1
Revision:	2
Stem:	Which of the following is NOT a nonspecific immune defense? [image]

Distractors

Distractor Text	Responses
Medication	2 (Correct)
Skin	0
Mucous Membranes	2
Inflammation	1
	1 (Omissions)

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LMS v5.8 – *SF - 182*

▶ **Administrator Submissions**

– The administrator can create, submit, and withdraw external requests on behalf of a user.

– They can also update data within the requests during the approval process.

– Requests can be transferred from one student to another.

▶ **Configurable Form Fields**

– Form fields can be configured from within the administrator application.

– Mandatory fields can be set.

– Any user field can be pre-populated from a user attribute in the system.

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Significant New Capabilities

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▶ **Plateau Learning**
- – Plateau LMS - ENHANCED
- – Plateau Virtual Learning System - ENHANCED
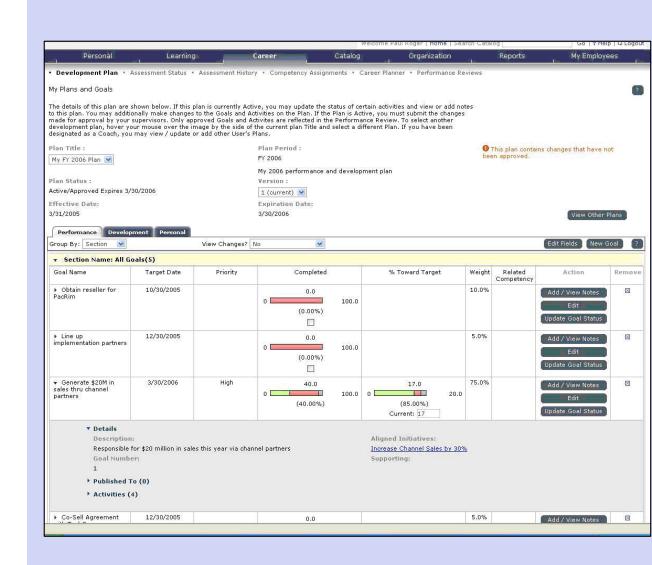- – Plateau Team Content LCMS

▶ **Plateau Performance**
- – Plateau Performance Goals & Appraisals – NEW
- – Plateau Goals Alignment – NEW
- – Plateau Multi-Rater – ENHANCED
- – Plateau Career & Development Planning – ENHANCED
- – Plateau Succession Planning – ENHANCED

▶ **Plateau Analytics and Business Intelligence** – ENHANCED

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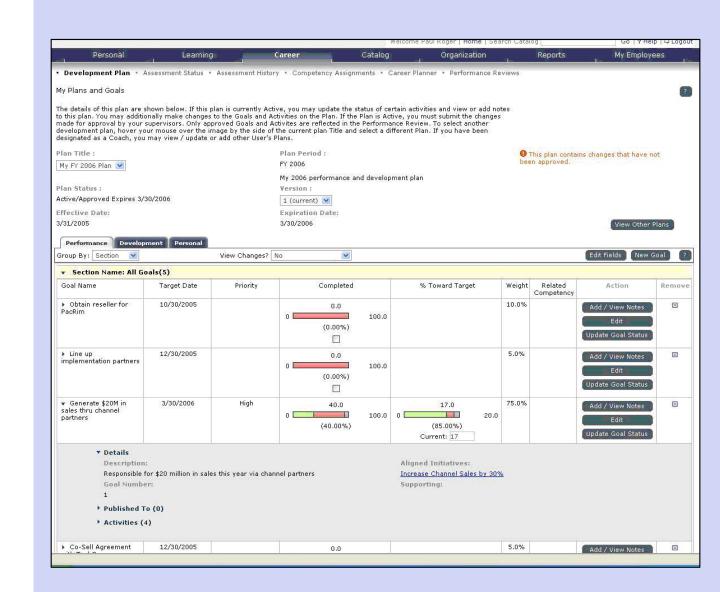# Introducing Plateau Performance Goals & Appraisals

- Linked Performance Goals & Appraisals

- SMART Goals

- Adaptable Rating Scales, Labels, and Criteria

- Gap Analysis

- Writing Assistant

- Configurable Templates & Workflow

- Integrated Learning and Succession Planning

Welcome Paul Roger | Home | Search Catalog | Go | ? Help | Logout

| Personal | Learning | Career | Catalog | Organization | Reports | My Employees |

• Development Plan • Assessment Status • Assessment History • Competency Assignments • Career Planner • Performance Reviews

My Plans and Goals

The details of this plan are shown below. If this plan is currently Active, you may update the status of certain activities and view or add notes to this plan. You may additionally make changes to the Goals and Activities on the Plan. If the Plan is Active, you must submit the changes made for approval by your supervisors. Only approved Goals and Activites are reflected in the Performance Review. To select another development plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.

Plan Title :
My FY 2006 Plan

Plan Status :
Active/Approved Expires 3/30/2006

Effective Date:
3/31/2005

Plan Period :
FY 2006
My 2006 performance and development plan

Version :
1 (current)

Expiration Date:
3/30/2006

⚠ This plan contains changes that have not been approved.

View Other Plans

Performance | Development | Personal

Group By: Section   View Changes? No   Edit Fields   New Goal

▼ Section Name: All Goals(5)

Goal Name	Target Date	Priority	Completed	% Toward Target	Weight	Related Competency	Action	Remove
▶ Obtain reseller for PacRim	10/30/2005		0.0 0 — 100.0 (0.00%)		10.0%		Add / View Notes Edit Update Goal Status	☒
▶ Line up implementation partners	12/30/2005		0.0 0 — 100.0 (0.00%)		5.0%		Add / View Notes Edit Update Goal Status	☒
▼ Generate $20M in sales thru channel partners	3/30/2006	High	40.0 0 — 100.0 (40.00%)	17.0 0 — 20.0 (85.00%) Current: 17	75.0%		Add / View Notes Edit Update Goal Status	☒

▼ Details
Description:
Responsible for $20 million in sales this year via channel partners
Goal Number:
1

Aligned Initiatives:
Increase Channel Sales by 30%
Supporting:

▶ Published To (0)
▶ Activities (4)

| ▶ Co-Sell Agreement | 12/30/2005 | | 0.0 | | 5.0% | | Add / View Notes | ☒ |

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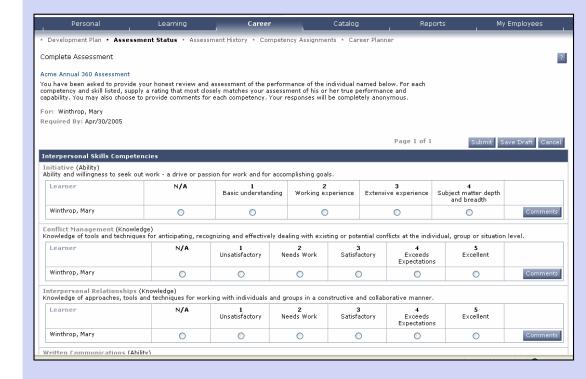# *Introducing* Plateau Goals Alignment

- Cascading Goals

- Role-based Goal Alignment

- 'User-to-User' Goal Alignment

- Organizational dashboard

- Full 'Line-of-Sight' Support

- Alignment Matrix

- Notifications

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Plateau 360 Multi-Rater v5.8 – *What's New*

▸ **User-Defined Rater Groups**
Custom groups (i.e. - customer) can be defined in addition to standard groups (self, peer, supervisor, subordinate).

▸ **User Self-Assessment**
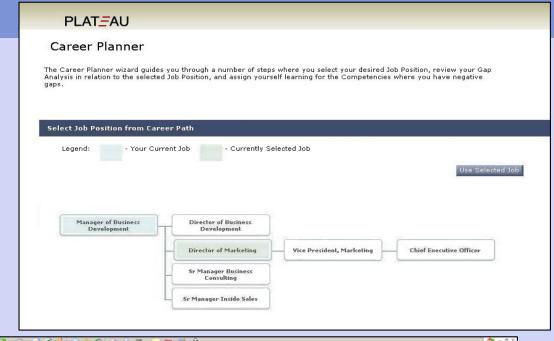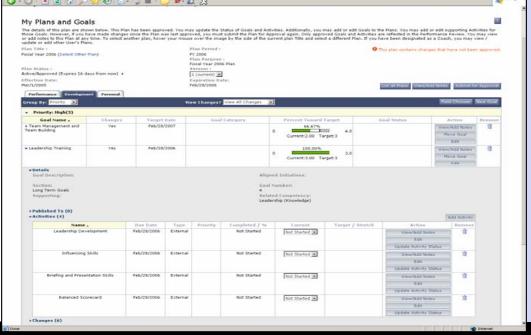Employees may start their own assessments.

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Plateau Career & Development Planning v5.8 – *What's New*

▶ **Graphical Career Path**
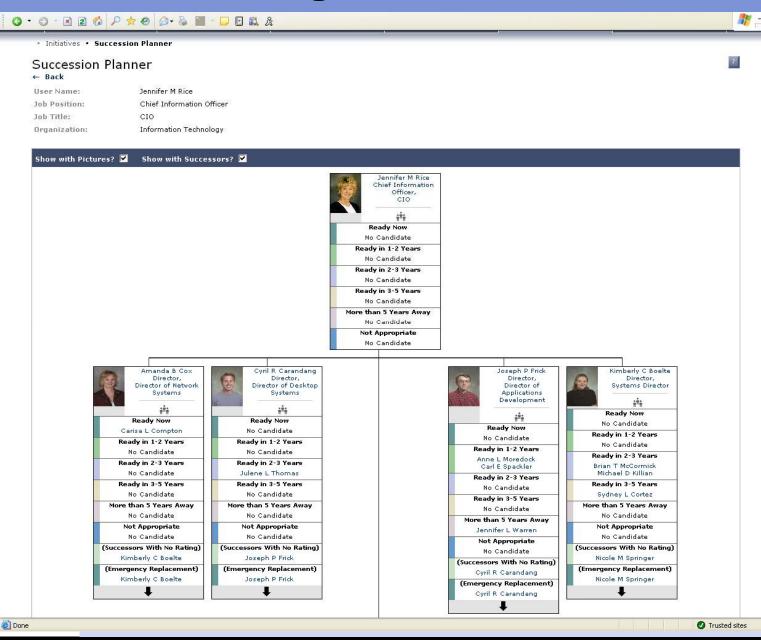Employees can navigate career progression scenarios and review requirements for targeted roles.

▶ **Gap Analysis**
Activities can be added to an employee's Development Plan to better achieve requirements for target role.

▶ **Career Path Definitions**
Defines typical career paths for given positions.

Plateau Succession Planning v5.8 – *What's New*

‣ Planning Dashboard

‣ Graphical Hierarchical Tree Navigation

‣ Best Candidate Search

‣ Candidate Profiles

‣ Promotional-Readiness Rankings

‣ Integrated Development and Learning

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Service Pack Updates

- ▸ SP 2 – Offline player

- ▸ SP3 – Supervisor Dashboard, Supervisor Organization Chart View, Supervisor Reports

- ▸ SP3 SF 182 patch – The new final approved form from OPM in Plateau with an instructional Text Box

- ▸ SP4 (Targetted for October) – Upgraded Plateau Question Editor

- ▸ SP5 – Plateau Report Designer, Kirkpatrick Reporting

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Product Roadmap – Sept/October

▸ Plateau Question Editor (PQE)

▸ SF-182 Enhancements
  – Update to Federal Government form for external training requests.

▸ Plateau Schedule Builder
  – New product that automates complex scheduling tasks and creates training schedules that make the best use of available resources.

▸ Performance Appraisal Enhancements
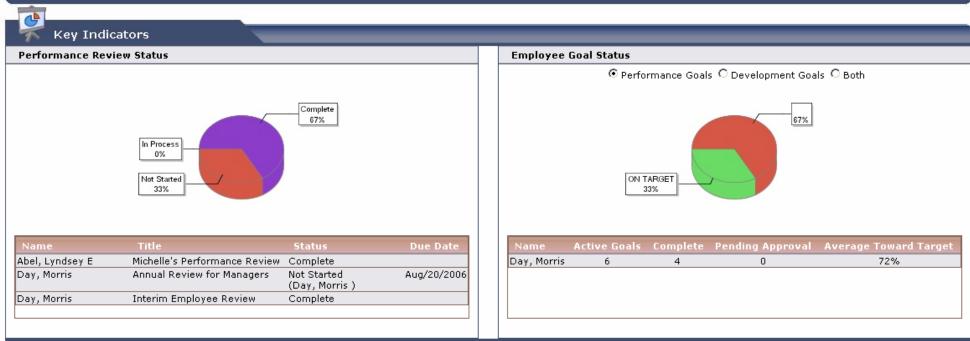 – Update encompassing additional form layout and workflow options.

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Welcome Rachel Jordan | Home | Search Catalog [   ] Go | ? Help | ⏻ Logout

| Personal | Learning | Career | Catalog | Organization | Reports | My Employees |

• **Dashboard** • Organization Chart • Employee Matrix • Learning Plans • Registrations • Assessments • Performance Reviews
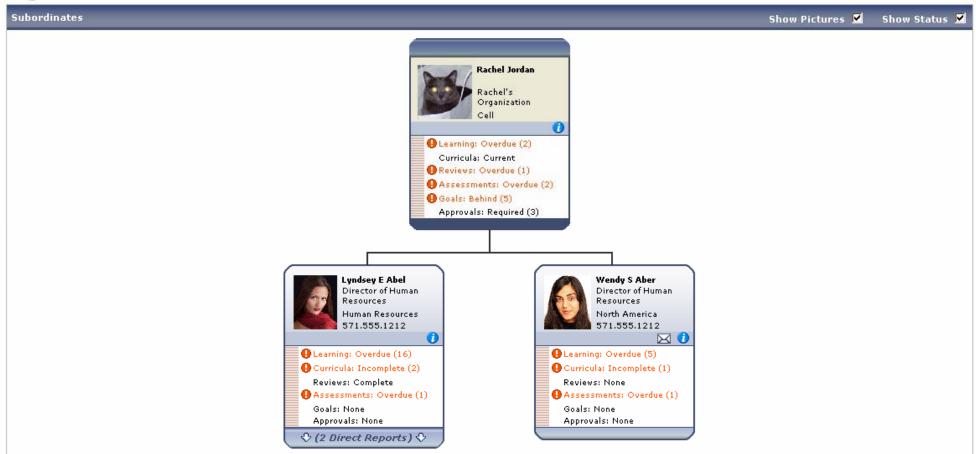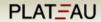
Dashboard

Employee Deadlines

Show: All ▾   Due Date: Overdue ▾

Employee ▲	Type	Title	Due Date	Status
Abel, Lyndsey E	Learning	Company Benefits Orientation	❗ Oct/15/2004	Must be registered
	Learning	Overview & Orientation	❗ Oct/15/2004	Must be registered
	Learning	Etiquette for Supervisors	❗ Feb/18/2005	In progress
	Learning	Emergency Response	❗ Mar/14/2005	Must be registered
	Learning	HR Handbook Document	❗ Mar/19/2005	Must be registered
	Learning	Microsoft Access 2000	❗ Mar/20/2005	Must be registered
	Learning	Microsoft Excel 2003	❗ Mar/20/2005	Must be registered
	Learning	Microsoft PowerPoint 2000	❗ Mar/20/2005	Must be registered
	Learning	Microsoft Word 2003: Foundations	❗ Mar/20/2005	Must be registered

Key Indicators

Performance Review Status

Complete 67%
In Process 0%
Not Started 33%

Name	Title	Status	Due Date
Abel, Lyndsey E	Michelle's Performance Review	Complete	
Day, Morris	Annual Review for Managers	Not Started (Day, Morris)	Aug/20/2006
Day, Morris	Interim Employee Review	Complete	

Employee Goal Status

◉ Performance Goals ○ Development Goals ○ Both

67%
ON TARGET 33%

Name	Active Goals	Complete	Pending Approval	Average Toward Target
Day, Morris	6	4	0	72%

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| Personal | Learning | Career | Catalog | Organization | Reports | **My Employees** |

· Dashboard · **Organization Chart** · Employee Matrix · Learning Plans · Registrations · Assessments · Performance Reviews

Organization Chart

Subordinates   Show Pictures ☑   Show Status ☑

Rachel Jordan

Rachel's
Organization
Cell

ⓘ

❗Learning: Overdue (2)
Curricula: Current
❗Reviews: Overdue (1)
❗Assessments: Overdue (2)
❗Goals: Behind (5)
Approvals: Required (3)

Lyndsey E Abel
Director of Human
Resources
Human Resources
571.555.1212
ⓘ

❗Learning: Overdue (16)
❗Curricula: Incomplete (2)
Reviews: Complete
❗Assessments: Overdue (1)
Goals: None
Approvals: None

⇩ **(2 Direct Reports)** ⇩

Wendy S Aber
Director of Human
Resources
North America
571.555.1212
✉ ⓘ

❗Learning: Overdue (5)
❗Curricula: Incomplete (1)
Reviews: None
❗Assessments: Overdue (1)
Goals: None
Approvals: None

Reports ?

Select a Report from the list below to run a report for yourself or your subordinates.

Report Name
Curriculum Status
My Plan
Item Requests
Item Status
User Information
Learning History
Learning Hours
Learning Needs
Learning Plan
Tuition
Succession Planning
Initiatives
Initiative Alignment
My Alignment
Performance Review Team History
Performance Review Status
Performance Review History Trend
Active Goals
Performance Review Comparison
360 Assessement Peer Vs User
Competency Assessment Comparison
Competency Assessment Trend
Close-Fit Jobs

SF-182 Instructional Text

This is the instructional text which spans multiple lines.

Done

---

ome William Burnette | **Home** | Search Catalog [   ] Go | **?** Help | ⌷ Logout

| Catalog | Organization | Reports |

story ▪ Record Learning ▪ **SF-182 Requests**

aining

te all of the required fields.

Submit

Read Through Instructions

Request, Authorization, Agreement & Certification of Training					

A. Agency Code, agency sub element and submitting office number

[   ]

B. Request Status / Record Action

⦿ Add   ○ Delete

A.1. Applicant's Name			First Five Letters of Last Name	A.2. Social Security Number	A.3. Date of Birth.
Last Name	**First Name**	**Middle Initial**	BURNE	[ ]	[ ] 📅
Burnette	William	T			

A.4. Home Address

Street Address	123 Main Street			**A.5. Home Phone** 867-5309	**A.6. Position Level** ○ a. Non-supervisory ○ b. Manager
City	**State / Province**	**Postal Code**	**Country**		○ c. Supervisory ○ d. Executive
Anytown	VA	23456	USA		

A.7. Organization Mailing Address

Add1	[ ]		**A.8. Office Phone** [ ]	**A.9. Work Email Address** ned@santapoco.c[
Add2	[ ]			
City	**State / Province**	**Postal Code**		
[ ]	[ ]	[ ]		

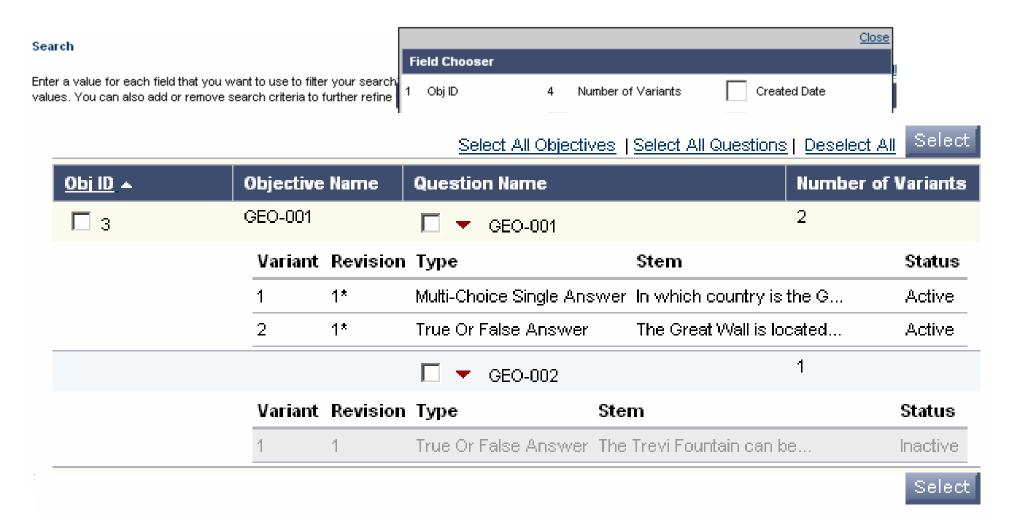| A.10. Position Title	A.11. Does applicant need special accommodation?	If yes, please describe below
	○ Yes ⦿ No	

Done

You asked for …

▸ Web-Based Question Editing

▸ Enhanced Question Search

▸ New Question Types

▸ Optional Use of Objectives

▸ More Question Editing Tools
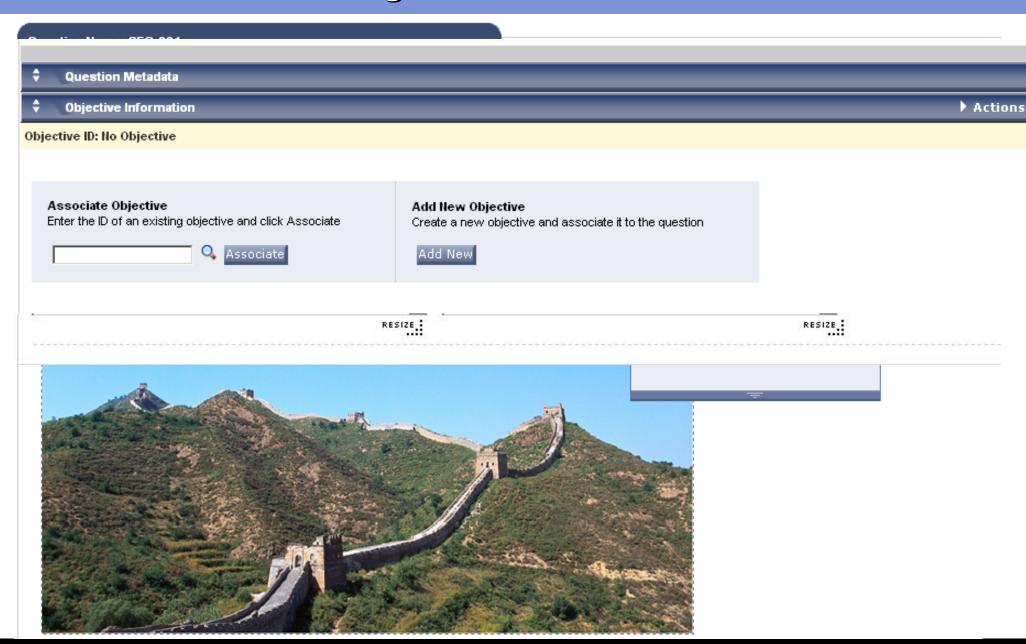
▸ More Intuitive Exam Building

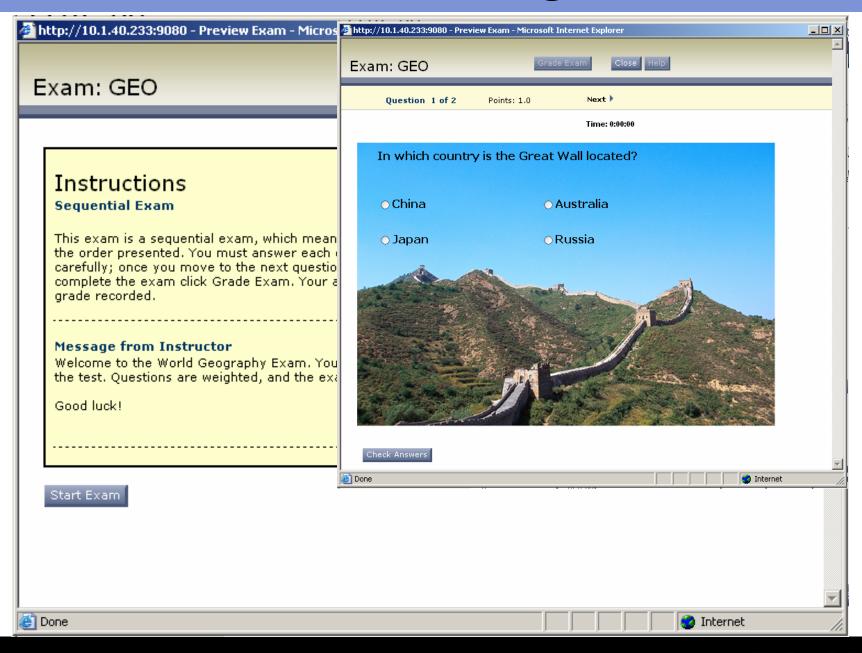▸ Improved Printed Exams

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Enhanced Question Search

More Question Editing Tools

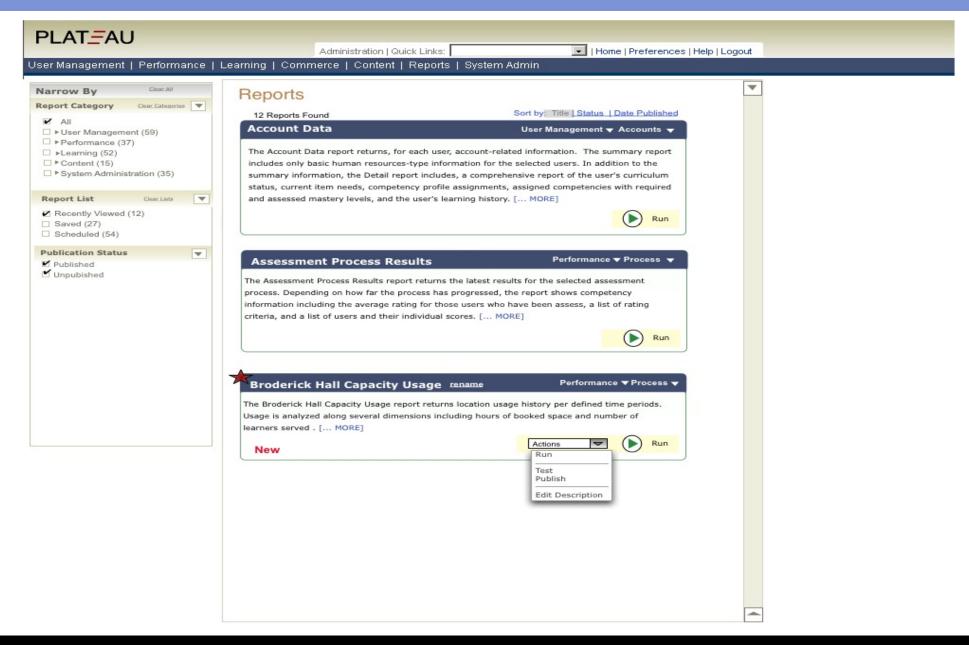Question Metadata

Objective Information

Actions

Objective ID: No Objective

Associate Objective
Enter the ID of an existing objective and click Associate

Associate

Add New Objective
Create a new objective and associate it to the question

Add New

RESIZE

RESIZE

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More Intuitive Exam Building

Browsing Reports

Kirkpatrick Evaluations

- ▸ Level 1, 2, and 3 Kirkpatrick evaluations
  - – New options on Items

- ▸ Reporting by:
  - – Completion Date lies between "Start Date" and "End date"
  - – Item
  - – Item Type (online course, instructor-led, etc.)
  - – Instructor
  - – Subject Area
  - – Facility

- ▸ Data can be grouped by Instructor, Item, Type, Facility

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Plateau Custom Reports

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Sample Instructor Report

Instructor Ratings Report

Start Date (based on completion):	7/1/2006
End Date (based on completion):	12/31/2006
Item:	Leadership Skills

Instructor: Jane Jones
Number of Responses: 54

	Average Rating
The instructor(s) was (were) knowledgeable about the course material.	3.75
The instructor(s) communicated the training information well.	4.25
The instructor(s) kept me interested in the course.	4.25
The instructor(s) demonstrated enthusiasm for training and the subject matter being taught.	3.75
Overall Rating:	**4.00**

Instructor: James Johnston
Number of Responses: 41

	Average Rating
The instructor(s) was (were) knowledgeable about the course material.	3.00
The instructor(s) communicated the training information well.	3.00
The instructor(s) kept me interested in the course.	3.25
The instructor(s) demonstrated enthusiasm for training and the subject matter being taught.	3.75
Overall Rating:	**3.25**

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