



# How Coactive partnered with a technical operations consultancy to eliminate forms shuffling and develop a global performance management application

## CASE STUDY

Date:  
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### About Coactive

Coactive builds innovative and intelligent business applications on our proprietary software development platform using rapid application development workflows and technology.

[www.gocoactive.com](http://www.gocoactive.com)



“ We don’t want people to worry about check boxing items as we’re talking about someone’s performance. We should be able to sit down and have a conversation about what can be improved, what they’ve done well and tools to help. ”

– **Amanda A.**, HR Director

## The Company

The client offers a comprehensive suite of services focused on reducing project and operational performance risk while delivering aggressive, mission-critical projects. From technology transfer, concept design, to asset performance strategies, owner project management, regulatory compliance consulting, training, and manufacturing process science.

## The Challenge

**Facing the future with a powerful new system or a step back in time...to paper assessments.**

It’s important to know how each resource, in this case the employee/agent, is working within the project. With global employees, the old ways of once-a-year reviews, sitting down and talking about an employee’s assessment were no longer efficient ways of gathering and giving feedback on performance.

They needed a new, updated system otherwise they were going back to using actual paper, which would obviously be a step back in time.

They wanted to create a simple solution that was real-time while getting away from assessment forms. They also wanted a system to help facilitate more conversations rather than shuffling impersonal forms.

*“I wanted to be able to document people’s work more clearly with fewer forms. That way, at the end of the quarter and end of the year, when we’re going through merit increases, we had a better way of understanding employee performance.”*



**INDUSTRY**

Technical operations consulting



**LOCATION**

Global



**EMPLOYEES**

Nearly 500



**CHALLENGE**

A paper assessment system was cumbersome and outdated



**SOLUTION**

An application that combined assessment ratings, performance and real-life conversations



**RESULT**

A feature-rich application that gives HR, client managers and regional managers real-time access to performance ratings and reviews.

They also wanted their skills matrix and their annual input form built into one application. They could then pull ratings from client managers and regional managers to combine the information in order to determine an employee rating for merit increase or not.

*“Employees may work on different projects throughout the year, which means working with more than one client manager. Having the ability to average client manager and the regional manager ratings means we have a better understanding of the employee’s performance.”*

## The Solution

### All the features in one application

Having demoed several off-the-shelf systems, they found several that had the features they wanted, but none that could integrate all of those features into one single business application. Plus, they didn’t want just another way to shuffle forms.

*“I didn’t see anything quite like what we’re developing. The other solutions were just a way to shuffle more forms back and forth. Sure, they could do some different things with those forms, but I didn’t want forms. People get more worried about completing the form rather than helping somebody and giving them better training.”*

They decided to work with the Coactive team to build an application that combined all the features they wanted from other solution.

We were able to create an application that pulled individual ratings and then calculated average ratings and put them into an automated performance assessment and performance feedback system.

*“I want things that are going to facilitate more of a conversation. I don’t want people to have to worry about check boxing items as we’re talking about someone’s performance. We should be able to sit down and have a conversation about what they’re doing well, ways they can improve, and some tools to help them do that.”*

## The Result

### An assessment application that leads to better performance conversations

Coactive was able to create an employee assessment app with features that let HR, client managers and regional manager see the data and numbers, plus use a real-time text messaging feature that was built in.

They are also working on a feature that would pull individual ratings from each manager then calculate those ratings into average ratings. Since employees work several projects with different managers, this allows a clear understanding of performance across all projects.

*“This isn’t even finalized. It’s not rolled out to the company as the development team is finishing the build. We have some of our regions testing before we roll it out to the rest of the company. My goal is to create a place where we can access different features are all in one space.”*

Coactive developers created something new and different that works for them. Something they didn’t find in any off-the-shelf products they demoed. They also have the ability to test it, see how it works, and update as needed.



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