

# Features and Benefits

You want better communication between managers and employees.

You want to track goals and competencies.

You need reviews to be done on time.

The easiest way is with Trakstar.



TRAKSTAR

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# Trakstar delivers performance reviews. Online.

Trakstar will help you motivate and retain top performers, align individual goals with those of your organization, and give you data to find areas of strength and areas for development. No other performance management software is more flexible or customizable than Trakstar.

## 1. Feedback

Your organization wants better communication between managers and employees about work and how it's going. Trakstar's performance reviews provide just the format that's needed.

"Managers ... are telling us they are having more regular coaching and feedback sessions."

Grigor McDonald, Farmlands Co-operative



## 2. Goals

Your organization sets goals and wants to track their progress throughout the year. Trakstar's performance reviews allow for goals to be set and updated all year long.

"Trakstar provides us with enormous flexibility to continually custom-design our metrics to match the culture and dynamics of our diverse workforce."

Jack Bell, City of Winter Park, Florida

145

2013

Average number of days to complete reviews

46

2014

31

2015

## 3. Reviews

Your organization wants to automate a manual review process to help things get reviews done on time.

"Trakstar has helped us do reviews in less time."

Linda Barineau, Redwire

# Winning with Trakstar

## Your organization wins

- ✦ **Improve** manager, employee, and HR productivity
- ✦ **Retain** top performers and create better organizational dialogue
- ✦ **Align** organizational and employee goals for bottom-line results
- ✦ **Develop** a consistent and fair appraisal process for better organizational interaction
- ✦ **Gather** data for decision-making with great reports

## Managers win

- ✦ **Recognize** and reward top employees for a job well done
- ✦ **Get** consistent performance from your team all year long
- ✦ **Coach** employees by providing meaningful feedback on performance
- ✦ **Keep** your team on task, ensuring they're working at high levels of effectiveness
- ✦ **Engage** employees in meaningful conversations about workplace goals and expectations

## Employees win

- ✦ **Suggest** goals that may advance career
- ✦ **Have** better conversations with management about workplace goals and expectations
- ✦ **Participate** in your own performance review
- ✦ **Ensure** extra efforts get noticed and rewarded

## Human Resources wins

- ✦ **Implement** a consistent, fair system for performance appraisals
- ✦ **Create** shared, digital repository for workplace goals and expectations
- ✦ **Encourage** system adoption with easy-to-use software
- ✦ **Eliminate** the paper chase
- ✦ **Increase** efficiency and complete appraisals on time

"I've been working for over 24 years in business in the field of HR and can say that Trakstar customer service ranks as one of the best I have ever experienced."

Helen Barker, Crossover Health, HR Director



## Trakstar's Mission

We create friendly software that makes it easy to set goals, have ongoing performance conversations, and do reviews, so that you can focus on doing great work.

# Trakstar Software Features

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Everything you need today, and tomorrow.

## Administrative Features

- Sections
- Multiple Rating Scales
- Locked and/or flexible weights
- Competency Library, 100+ to choose from
- Department-specific Appraisal Processes
- Multiple Score Formatting Options
- Email reminders, for different types of appraisals
- At-a-glance Status Reports
- Unlimited Appraisal Forms
- Unlimited Reviews
- Custom Reports
- Routes for Approval
- User Activity Log
- HRIS Update
- Strategic Goal Alignment
- Multiple Workflows
- Visual Org Chart
- Employees may report to two Managers
- Performance Improvement Plans
- Ad-hoc Appraisals
- Auto-archive of appraisals
- Goal Counter
- Performance History Report
- Performance Ranking Report
- Rating Distribution Report
- Rater Bias Report
- Form Version control

- International Date Formatting
- Upload your organization's logo
- Scores available prior to archive for calibration
- Section score reporting
- Export of narrative responses
- Form sections with one-sided permission — Manager, Employee, Multi-rater
- Shared Goal Library
- SSO/Single Sign-on

## Manager Features

- SMART Goals
- Metric Goals
- Cascading goals
- Open-ended Questions
- Document Attach
- Comments/notes with time-stamp
- Spell-check
- Email reminders for goals
- Manager reports
- Employee performance history report
- 360-degree feedback (anonymous or visible)

## Employee Features

- Self-appraisals
- Comments/notes with time-stamp
- Performance appraisal archive
- Individual Goal Setting ability
- Add thumbnail picture

# Your favorite feature: Trakstar's Support Team

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We take performance appraisals process off your desk and onto ours.

When you get busy with hiring, open enrollment and other activities in your busy HR world, Trakstar's support resources will be a great relief.

From QuickGuides to Video Tutorials, help is just a click away.

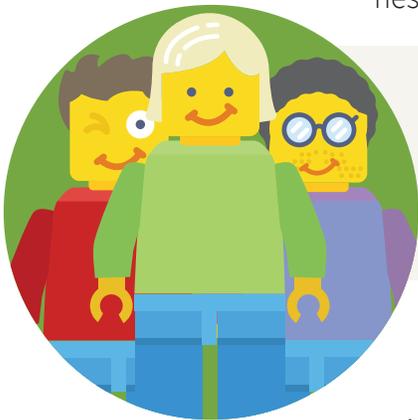
## VIDEO TUTORIALS

Need a hand? Trakstar's Video Tutorials are always available for managers, employees and Trakstar Administrators to learn Trakstar on their own time. Additionally, you can use Trakstar's Video Tutorials to help orient new and current employees with Trakstar. You've got backup.



## HELP DESK SYSTEM

Need some help? This is a system you'll feel good about. Trakstar's help desk system allows you to submit help inquiries at [support@trakstar.com](mailto:support@trakstar.com). Our support team is human and thoughtful, seeing your big picture and the small details at the same time. Help Desk inquiries are answered during normal business hours and days: Monday–Friday 9 a.m.–8 p.m. EST (USA).

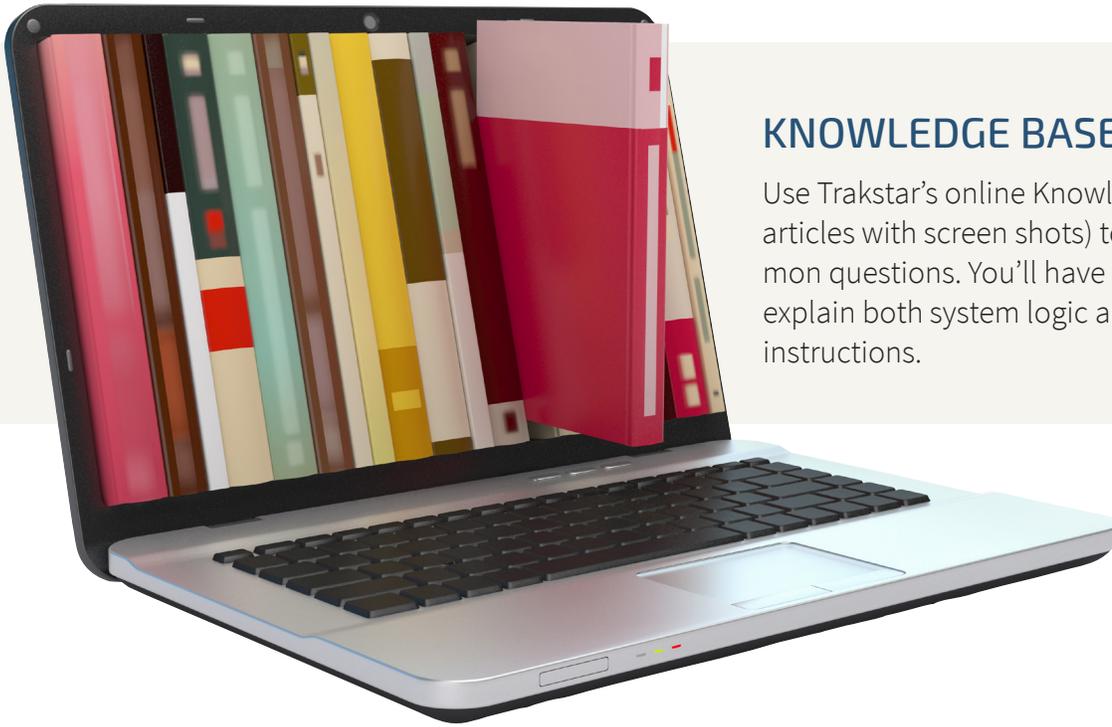


## UNLIMITED SUPPORT

You'll appreciate that our support team is there when you need them. Ask a few questions or a lot of questions; you'll be thrilled with the thorough responses you'll receive.

## RECORDED TRAINING

You can choose to have your training sessions recorded for playback, helping you with new hires, promoted employees, or those who were unable to attend training.



## KNOWLEDGE BASE

Use Trakstar's online Knowledge Base (support articles with screen shots) to help you with common questions. You'll have access to articles that explain both system logic and/or step-by-step instructions.



## EMPLOYEE & MANAGER QUICKGUIDES

You'll love having the QuickGuides at your fingertips. Distribute the PDF guide to your employees and managers and you'll be providing step-by-step instructions on how to use Trakstar. They are easy-to-use guides that contain big pictures and simple instructions.

## TRAKSTAR ADMINISTRATOR WEBINARS

You'll love the frequent and relevant webinars we conduct for Trakstar Administrators. A sampling of topics include: Form Design Best Practices, How to Read Your Reports, and much more. You'll find a calendar of events listed at [www.trakstar.com/webinars](http://www.trakstar.com/webinars). All webinars are free and will help you get the most out of Trakstar.



"Pros - Easy to use; support team is super fast to respond to questions.

Cons - None! We love it."

Sherrri Einsmann, Guthy-Renker

"I learned fast, my staff learned fast, and the informational webcasts have been informative."

Beverlee Patterson,  
ABC Global Services President

# Reports

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Standard reports. Custom reports. It's your call.

You'll be able to report on employee performance – in infinite configurable ways.

Or maybe you just want some default reports.

With Trakstar, you can report on the big picture and small details, your way.

Trakstar's reports will reveal performance trends and provide tangible data to help your organization.

Want to know who the top performers are? Which managers tend to rate highly, and which don't? Which departments need more training?

Trakstar's Performance Ranking, Performance History, Rating Distribution and Rater Bias reports are modern and flexible, and you can customize the data set to get exactly the report you need.



## SSO HRIS LDAP

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### HRIS

Our universal HRIS Sync feature lets admins sync data with existing HRIS application using a standard spreadsheet upload.

HRIS Sync allows admins to easily make bulk changes with confidence and convenience, allowing adding or changing thousands of users at the same time.

### Single Sign-On (SSO)

Trakstar can integrate with any SAML-based authentication service to achieve a seamless login experience. We partner with identity providers like OnLogin and Okta to expedite your integration.

Trakstar can also connect directly to your organization's existing Active Directory server via LDAP.

# Professional Competency Library

Trakstar provides 100 competencies with leveled descriptions of performance at each of five levels. Coaching tips are also included with each competency.

Custom competencies may be added to the Trakstar Library as desired.



## COMPETENCY: COMMUNICATION

**Definition:** Communication refers to the ability to inform orally and in writing, with clarity and good effect.

### Outstanding

Displays a very quick grasp of the significance of information communicated and nearly always initiates or respond to communications in an appropriate, timely and comprehensive manner.

### Exceeds Expectations

Shows an understanding of the need to initiate or respond to information in an appropriate, timely and complete manner.

### Meets Expectations

Oral and written communications are usually acceptable, being both comprehensible and appropriate.

### Needs Improvement

Shows inconsistency in communication.

### Unsatisfactory

Regularly fails to communicate, listen to or correctly understand information.

"Trakstar is enormously intuitive."

David Gay, KaBOOM! VP Talent Management

## TRAKSTAR COMPETENCIES

### Behavioral Competencies

Action Oriented  
Adaptable  
Analytical Thinking  
Approachability  
Business Acumen  
Comfort With Management  
Communication  
Composure  
Confidentiality  
Confronting Employees  
Continuous Learning  
Cooperation  
Creativity  
Customer Focus  
Dealing with Ambiguity  
Dealing with Paradox  
Decision Quality  
Delegation  
Dependability  
Drive for Results  
Flexibility  
Intellectual Horsepower  
Interpersonal Skills  
Listening  
Organizational Agility  
Peer Relationships  
Politically Savvy  
Priority Setting  
Strategic Agility  
Self-Development  
Problem Solving

### Values-based Competencies

Care for Employees  
Career Ambition  
Compassion  
Cost Consciousness  
Courtesy  
Ethics and Values  
Humor  
Initiative  
Innovation  
Integrity and Trust  
Judgment  
Patience  
Perseverance  
Self-Knowledge  
Work-Life Balance

### Managerial Competencies

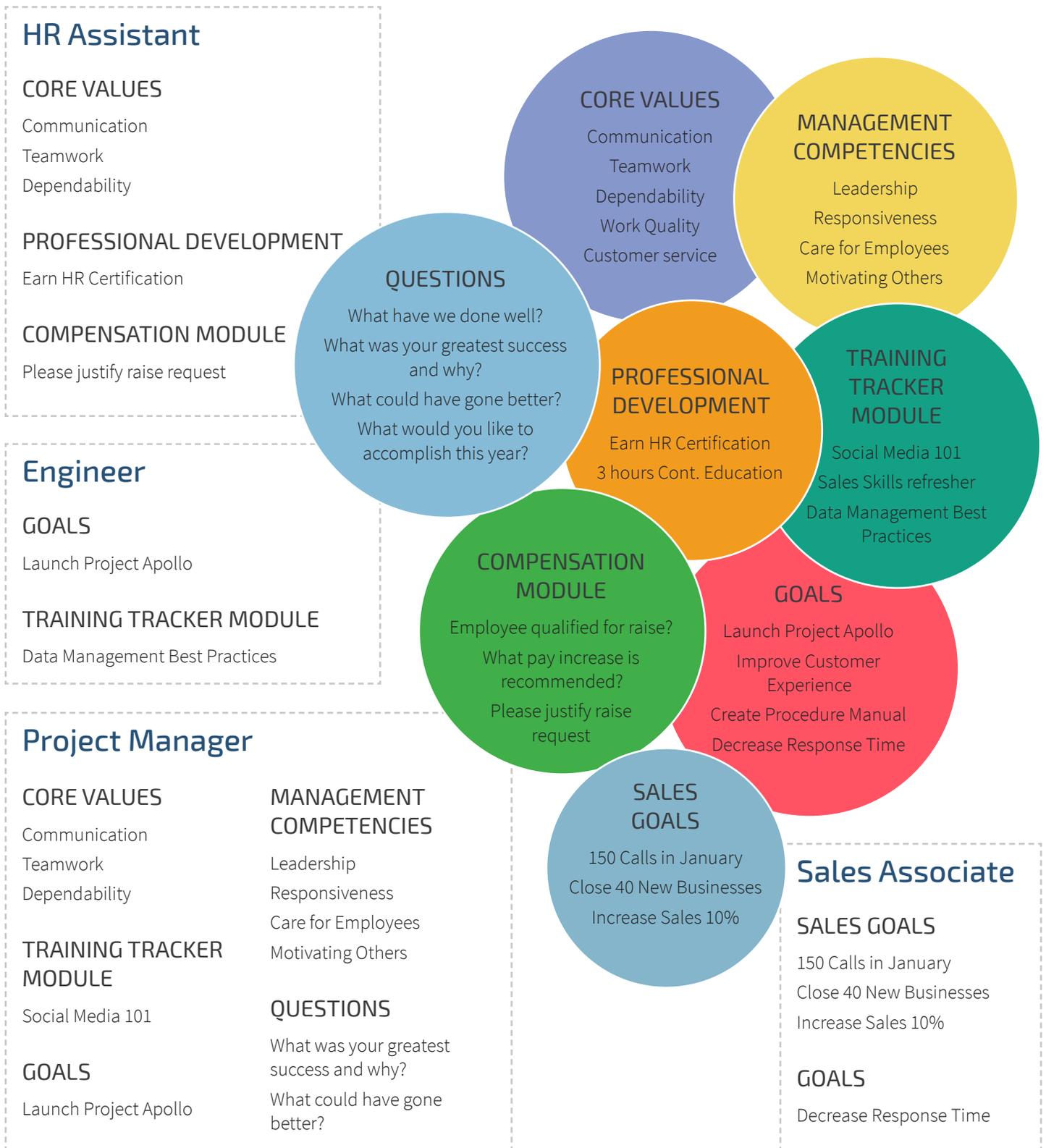
Change Management  
Developing Employees  
Directing Others  
Fairness to Employees  
Hiring and Staffing  
Impact and Influence  
Leadership  
Management Leadership  
Managerial Courage  
Manager Relationships  
Managing and Measuring  
Managing Diversity  
Managing Systems  
Managing Vision  
Mentoring  
Motivating Others  
People Development  
Performance Coaching

### Skill-based Competencies

Appearance  
Attendance  
Building Teams  
Care and Use of Equipment  
Command Skills  
Communications Oral  
Communications Written  
Conflict Management  
Customer Service  
Informing  
Job Knowledge  
Learning Skills  
Negotiating  
Organizing  
Planning  
Policy Compliance  
Presentation Skills  
Project Management  
Safety  
Sales Goal  
Sales Skills  
Technical Skills & Learning  
Technical Support

# Totally Flexible Forms

Re-create something that is working for you. Design something fresh and new. From the simple to the complex, Trakstar can build it.



# You'll have a wonderful implementation

The Trakstar implementation process is both methodical and fun!

We break up the learning and customization into a series of meetings, and strive to complete the process within 3-6 weeks.



Trakstar Implementation is a personalized learning experience. We'll:

- ✧ Import users
- ✧ Build your forms
- ✧ Customize details around timing, emails, and much more.
- ✧ Rehearse it all with you
- ✧ Deliver training to managers and employees
- ✧ You'll go LIVE!

There are resources to help you along the way – from planning packets, to project checklists, and more.

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"We have been using this software since 2010 and there are two major reasons we are still using it. The ease and flexibility of making changes as we deem necessary to improve our employees to exceed the expectations of our customers and the technical support at Trakstar.

"... The technical support is an 'Exceed.' We never have to wait more than 24 hours for a solution to our challenge. The technical support operates as if they are a part of our organization."

John Samore, Jr., VP Employee Capital and Chief Financial Officer at Vermont Outlet