PerformanceAlly

We provide the only realtime performance management software to digitally enable sustainable behavior change to achieve targeted results.

"Our employees are measurably more engaged in their jobs. And our financial numbers have soared."

— CHIEF EXECUTIVE OFFICER, LEADING REAL ESTATE COMPANY

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TRANSFORMING THE WAY HUMAN PERFORMANCE IS MANAGED REALTIME @WORK

PROBLEM

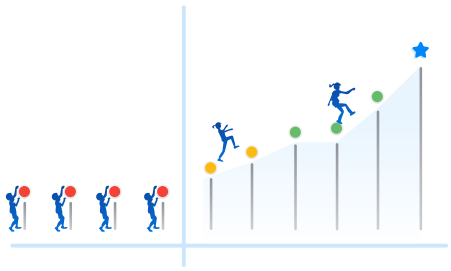
Companies are not effectively harnessing the tremendous power of human performance. In spite of investing in software to cascade goals, train associates, and encourage realtime rewards and recognition, associates consistently report lacking the most basic things they need to drive performance every day (see figure below*).

TRADITIONAL MANAGEMENT APPROACHES ARE NOT MEETING ASSOCIATES' BASIC PERFORMANCE NEEDS

OPPORTUNITY

A modern, grassroots approach

According to Gallup, high performing, high engagement organizations put the focus on concrete, realtime performance management activities such as clarifying work expectations, collaboratively setting goals, getting people the resources they need to do their work, and providing ongoing, meaningful coaching conversations. In today's fast-paced modern workplace, leaders cannot do all these things alone—a grassroots, digitally-enabled approach is needed to engage everyone realtime in addressing these needs to optimize human performance and help organizations and their associates succeed.



If ratios improve to

8 in 10

- ↑ 23% Profitability
- ↑ 18% Productivity
- ↑ 41% Quality
- ↑ 10% Customer Loyalty
- ↓ 43% Turnover
- ↓ 81% Absenteeism
- ↓ 28% Shrinkage
- ↓ 64% Safety Incidents

*Reference: Gallup's 10th Employee Engagement Meta-Analysis (2020)

AllyAssist

“I've worked where this behavior-centric management approach was widely applied and I saw the results firsthand, including in my own management practices . . .

This approach had more impact than any other intervention . . .”

— EXECUTIVE
HEALTHCARE INSURANCE COMPANY

Our app reliably improves any targeted performance 25-50%

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OUR SOLUTION

Our software, Ally Assist, leverages behavior science algorithms to turbocharge other management systems with behavior-based performance improvement tools. It automatically wires together strategic networks of allies (customers, leaders, associates, and other stakeholders) to produce mutual results.

ALLIES CONNECT REALTIME TO GIVE AND GET:

Clear expectations

Rapidly align around performance expectations.

Individualized feedback

Artfully give and receive feedback from multiple sources on mission-critical Vital Behaviors.

Barrier removal

Bust through human performance barriers.

THREE MODULES

Organizations can choose to implement one, two, or all three modules.

Leader Module

Tools to ensure leaders provide ongoing, high-quality performance coaching (in one-on-one meetings, team huddles, regular management meetings) and get meaningful feedback on their coaching effectiveness.

Team Module

Tools for leaders and teams to achieve realtime alignment around performance expectations, get and give meaningful feedback to each other, remove barriers proactively together, and align daily behaviors to achieve targeted results.

Customer Module

Tools to gather individual customer expectations and experience data and communicate them to associates so they can make realtime service adjustments.

TOP BENEFITS FOR USERS

Senior Leaders	Leaders and Teams	Customers
Get a window into their organization to see how daily execution is going and how to help.	Get a “coach-in-the-pocket” to get and give targeted, realtime performance support.	Get their voices heard and acted on in a highly personalized way.

OVERVIEW OF HOW ALLY ASSIST WORKS

There are two phases for implementing Ally Assist in an organization.

PHASE 1: BEHAVIOR BLUEPRINT CONFIGURATION™

In a short period of time, leaders receive valid data about the degree to which they can count on people to execute strategies and plans efficiently and effectively through consistent, daily actions—and what to do if undesired behavior variability leaves the organization vulnerable to poor performance results.

Working with our Human Performance Engineers, Senior Leaders and project teams configure a Behavior Blueprint, which provides concrete steps to accelerate execution through mission-critical Vital Behaviors.

Our rapid-cycle crowdsourcing tool engages 100% of allies in configuring the Behavioral Blueprint. It helps:

- Prioritize People-Powered Improvement Opportunities based on undesired behavioral variability
- Create a starter set of Vital Behaviors
- Identify which Behavior Boosters and Barriers need to be addressed
- Map Ally Networks to connect the right people at the right time to give and get realtime clarity, feedback, and barrier removal

This phase generates speedy alignment and broad-scale buy-in to the Behavior Blueprint. People at all levels will be eager to get started.

Performance Ally Support

Human Performance Engineer Consulting

plus

Digitally-Assisted Crowdsourcing

A **People-Powered Targeted Results**

Identify a strategically important targeted result the organization can dramatically improve by increasing behavioral consistency among Key Performers.

B **Key Performer Groups**

Prioritize the Key Performer Groups whose behavioral consistency will most improve the targeted result.

C **Line-of-Sight Vital Behaviors**

Gather input from all Key Performers and experts to identify the most mission-critical Vital Behaviors that will reliably produce targeted results.

D **Feedback Loops**

Identify who is best positioned to provide realtime performance feedback to Key Performer Groups on their Vital Behaviors.

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OVERVIEW OF HOW ALLY ASSIST WORKS

PHASE 2: ORGANIZATION BEHAVIOR MOMENTUM™

The Behavior Blueprint is used to configure our software, Ally Assist, for quick deployment in your organization. Our DIY Learning Modules and AI-driven behavior algorithms guide 100% of users in concrete, realtime performance management activities to ensure every moment counts.

AllyAssist plus DIY Learning Modules

A **Short Personalized Pulse Checks & Targeted Spot Checks**

Pulse Check surveys and in-person Spot Checks sample Vital Behaviors to measure Individual Habit Strength and Organization Behavior Momentum.

B **Behavior Momentum Dashboards**

Our visual performance dashboards provide a continuous line-of-sight between Vital Behaviors and targeted results to know when to celebrate and what to improve.

C **Focused Ally Assists**

This unique focused communication channel helps allies give and get realtime clarity, feedback, and barrier removal.

D **People-Centered Barrier Removal**

This simple tool helps allies surface barriers that get in their way and resolve them locally or escalate.

E **Leader Performance Coaching**

This performance coaching tool ensures leaders routinely engage team members in high-quality, as well as data-based performance discussions, and receive feedback on the effectiveness of their coaching.

IMPLEMENTATION

Ally Assist is configured for each organization to integrate seamlessly with existing workflows. The app can stand alone or be integrated with other systems. Configuration is supported by our Human Performance Engineers as needed.

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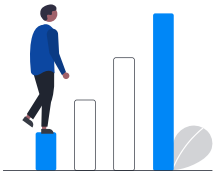
USER EXPERIENCE

Line-of-Sight Vital Behaviors Make Expectations Clear to All

Using a grassroots, crowdsourcing process we gather input from 100% of users in an Ally Network to pinpoint the mission-critical Vital Behaviors that will reliably produce targeted results. This approach cuts through the clutter and helps everyone align around a shared set of Vital Behaviors.



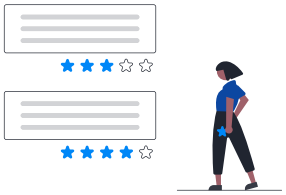
Vital Behavior Card

Each user then receives a Vital Behavior set tailored to their role. These Vital Behaviors make expectations clear and are at the heart of what is observed and reinforced by other allies in the system. Users can view their Vital Behaviors anytime and quickly access job aids and allies who can help them. In addition:

- Individuals can choose one Vital Behavior to master personally. By doing so, they open themselves up to encouragement and feedback from others.
- Teams can set a team behavior goal, which they commit to managing and achieving together.
- Vital Behaviors can be adjusted dynamically as organizational challenges and priorities change.

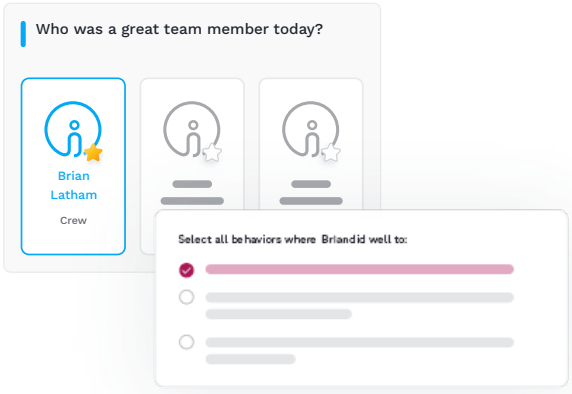
Pulse Checks & Spot Checks

Our random sampling process converts Vital Behaviors into short Pulse Check surveys and targeted, in-person Spot Checks to make sure everyone gets the right mix of positive and constructive feedback from multiple sources—with minimal effort.



The survey response rate is >85% because they are quick, behaviorally-specific, and personalized to meet the needs of both the feedback giver and receiver.

Behavior-Based Pulse Check Questions



Team Pulse Checks

Teams take 60-seconds to rate how well they did on randomly selected Vital Behaviors on each shift.

Personal Pulse Checks

Leaders and other Key Performers can be included in a very personalized sampling process to get frequent, individualized feedback.

Customer Pulse Checks

Individual customers communicate their expectations and/or service experience in short, personalized Pulse Checks. Their input is communicated directly to the team members who served them so they can make adjustments as soon as possible. If customers wish, they can engage in Ally Assists to provide further clarity and feedback.

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USER EXPERIENCE

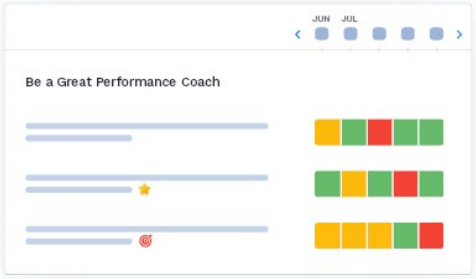
Extraordinary Individualized Feedback Changes Behaviors Within Two-Weeks

Behavior change occurs quickly when people know what they need to do, understand that their behaviors will be randomly sampled, and receive frequent, meaningful feedback from many credible sources.

Our behavior-science based feedback system tracks whether individuals are receiving the magic mix of positive to constructive feedback (5:1) and nudges actions leaders can take to adjust the mix.

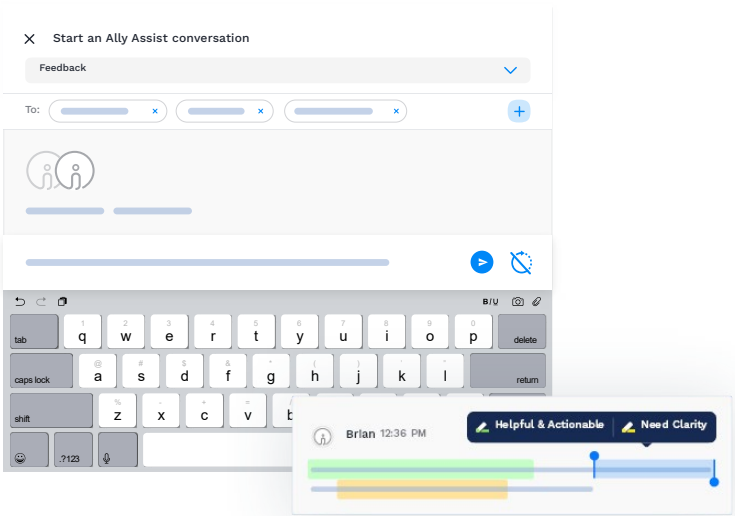
Heat maps organize ratings feedback from Pulse Checks into red, yellow, and green so users can see their progress over time for specific behaviors.

Vital Behavior Heat Map



Comments made on Pulse Check surveys and in-person Spot Checks are communicated directly to those individuals whose behavior was being sampled. They can use Ally Assists to engage in further dialog with the person who provided feedback.

Ally Assist Communication Thread



Focused Ally Assists

Our unique communication thread guides users in giving and receiving clarity, feedback, and barrier removal anytime.

Ally Assist's exclusive Clarifier Tool lets users highlight specific text within a thread that is helpful and actionable or needs further clarity.

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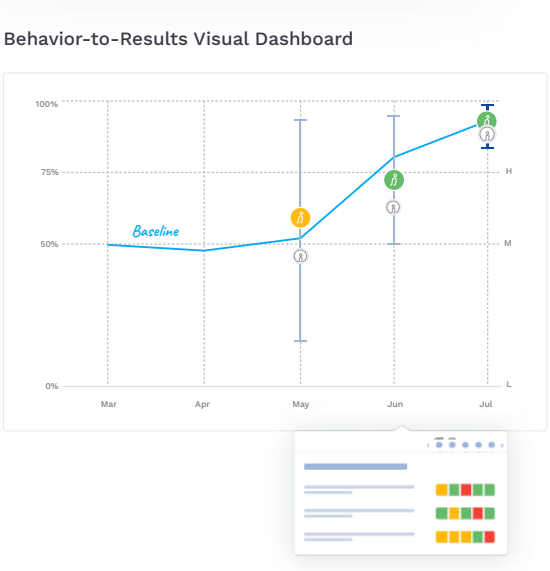
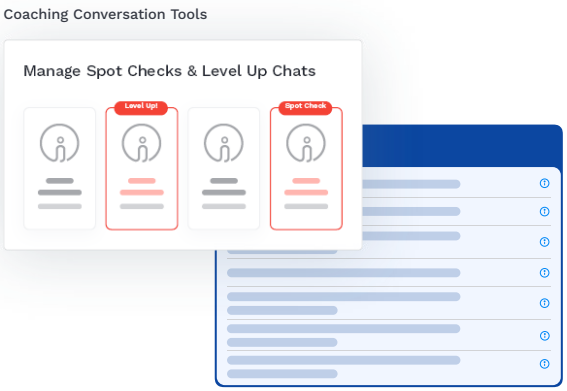
USER EXPERIENCE

Behavior Momentum Dashboards for All Levels of Users

As individuals master Vital Behaviors, targeted business results improve. Our easy-to-use dashboards provide continuous line-of-sight between Vital Behaviors and targeted results, helping users quickly prioritize which behaviors to improve, when to celebrate progress, and when to select new behaviors.





Performance Coaching Tools for Leaders

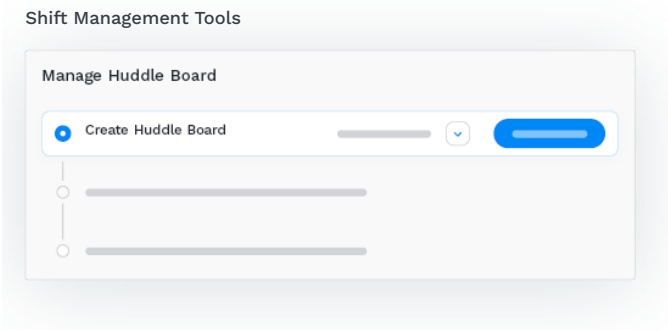
Leaders at all levels become skilled at providing high-quality, ongoing performance coaching to their team members. We provide a starter set of Performance Coaching Vital Behaviors to guide leaders in how to coach. Then we make it easy for them to individualize their coaching by making them aware of what the associate needs from them, which Vital Behaviors are most important to focus on now for each employee.

Ally Assist automatically manages realtime Spot Checks and schedules one-on-one Level Up Chats, taking the administrative burden off leaders so they can focus on the employee's needs.

The Perfect Shift

Ally Assist helps leaders manage their team huddles effectively. They start the shift by engaging everyone in reviewing the visual performance board, setting shift goals, and planning for daily behavior excellence. They end the shift by communicating what went well and where there is room to improve.

When all shift leaders run their huddles in a consistent way, results are reliably improved organization-wide.



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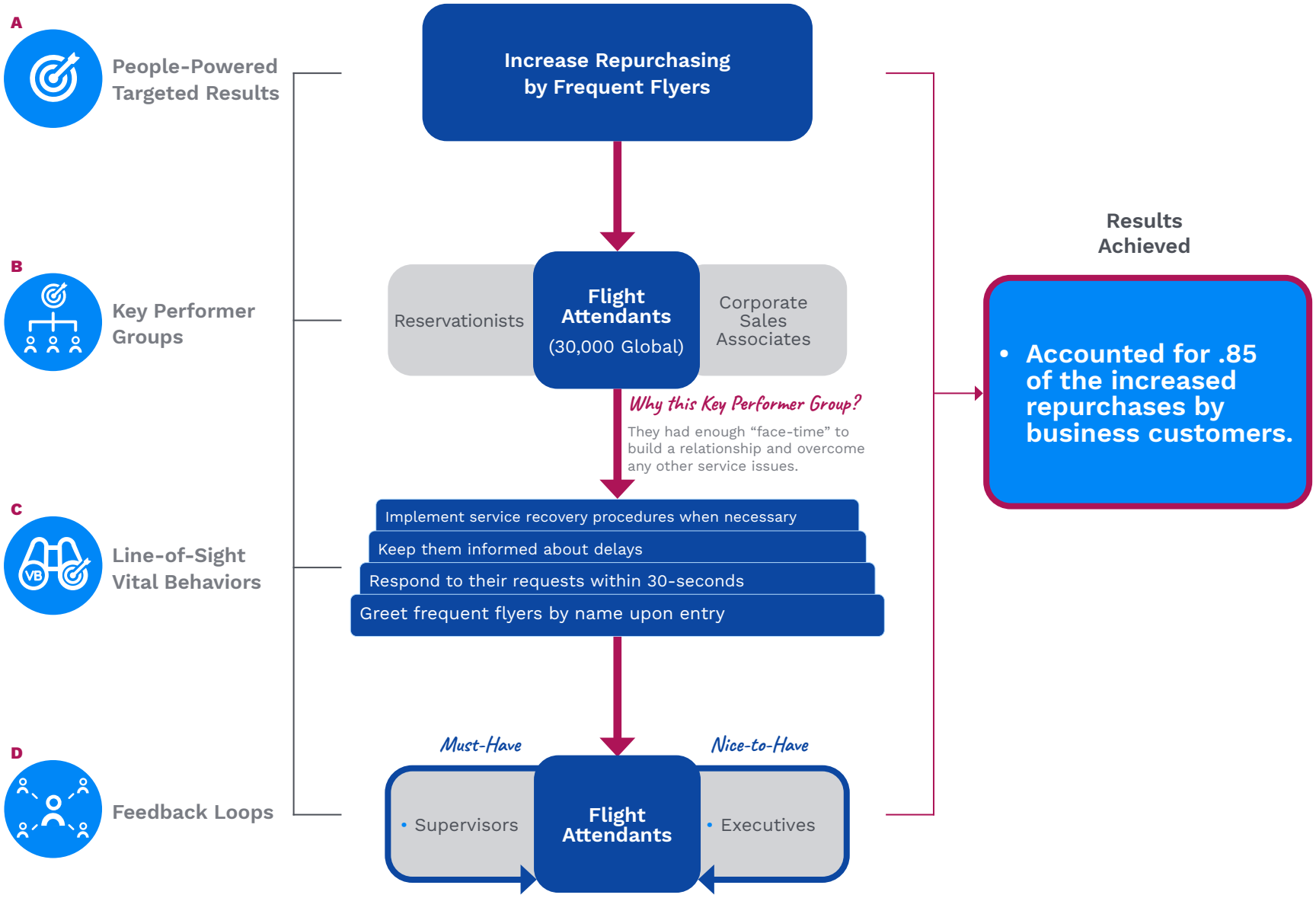
CASE EXAMPLES

SELECT ONE:

- **Airlines**
- **Cable**
- **Consumer Packaged Goods**
- **Healthcare — Academic Medical Center**
- **Healthcare — Long-Term Care Facility**
- **Oil & Gas**
- **Telecommunications**

CASE EXAMPLE: AIRLINES

AllyAssist



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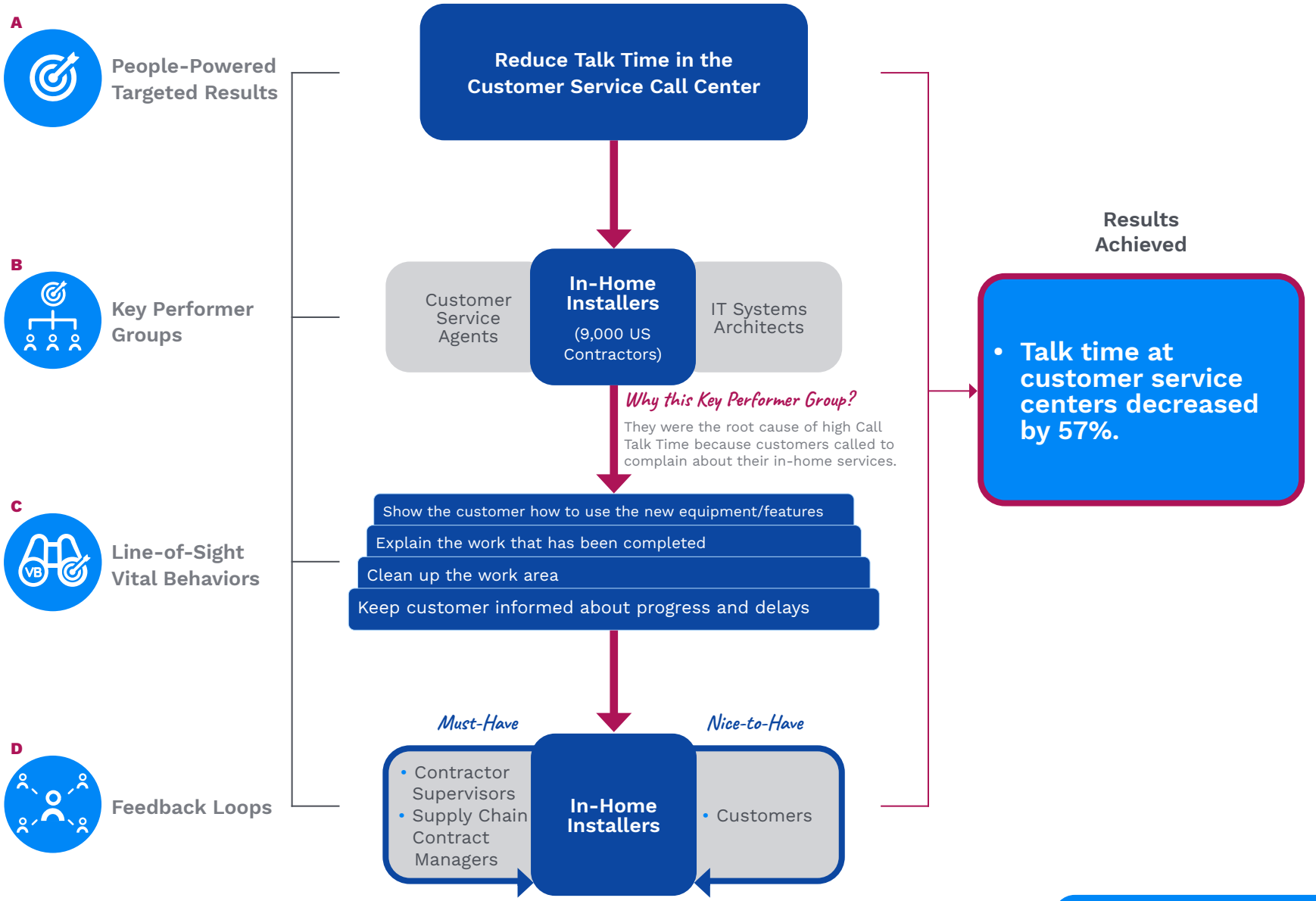
CASE EXAMPLE: CABLE

AllyAssist



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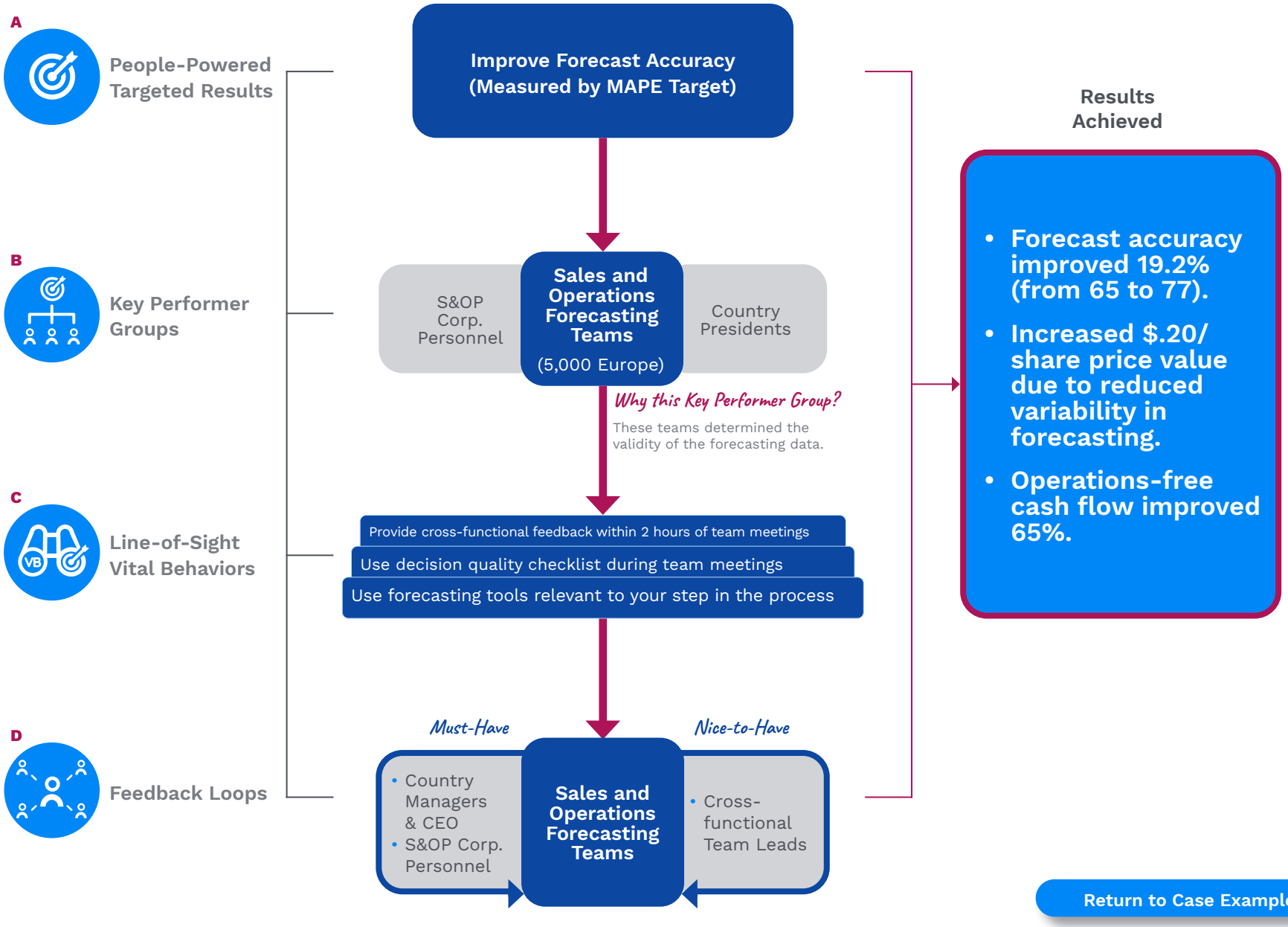
CASE EXAMPLE: CONSUMER PACKAGED GOODS

AllyAssist



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CASE EXAMPLE: HEALTHCARE — ACADEMIC MEDICAL CENTER

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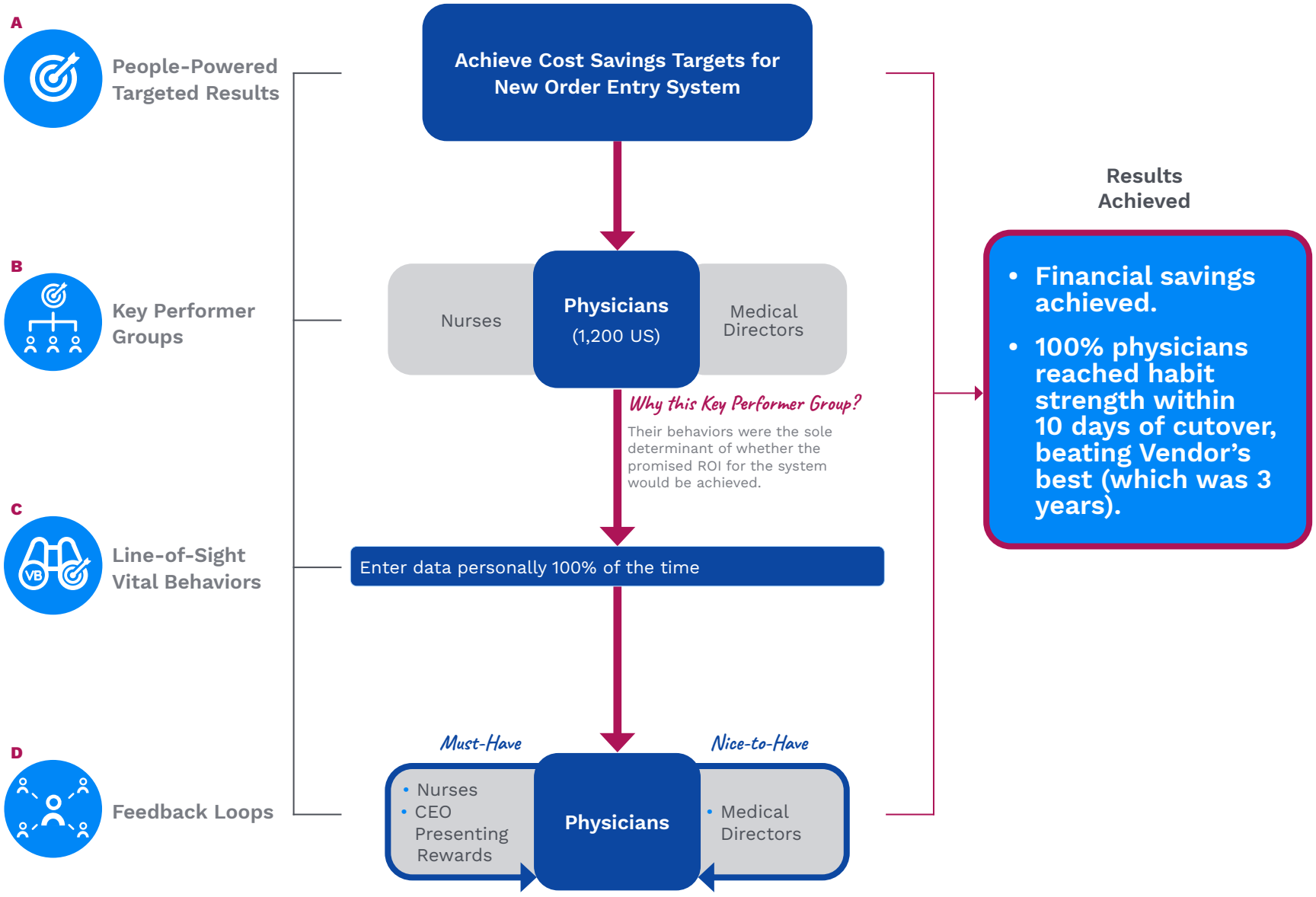

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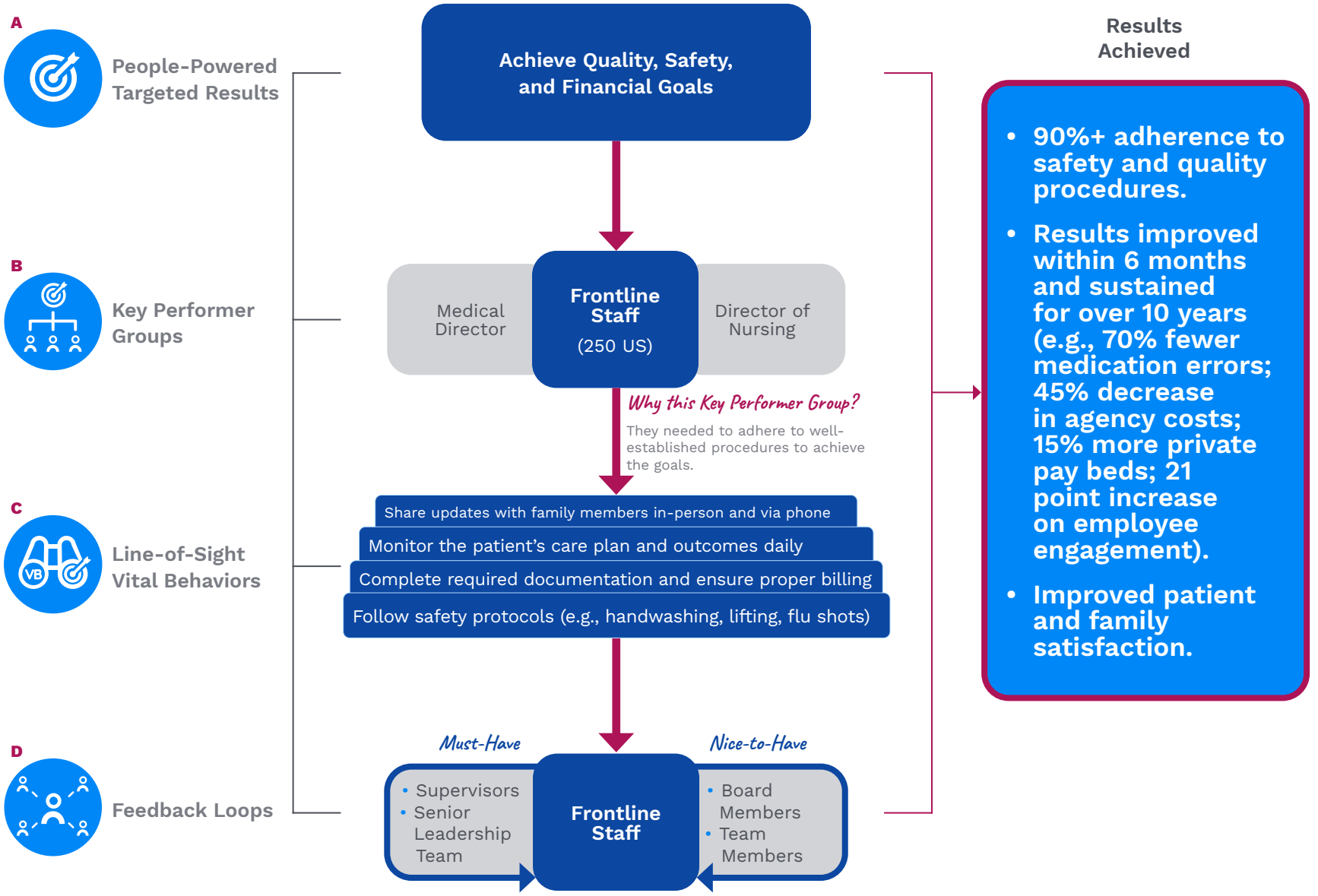
CASE EXAMPLE: HEALTHCARE — LONG-TERM CARE FACILITY

AllyAssist



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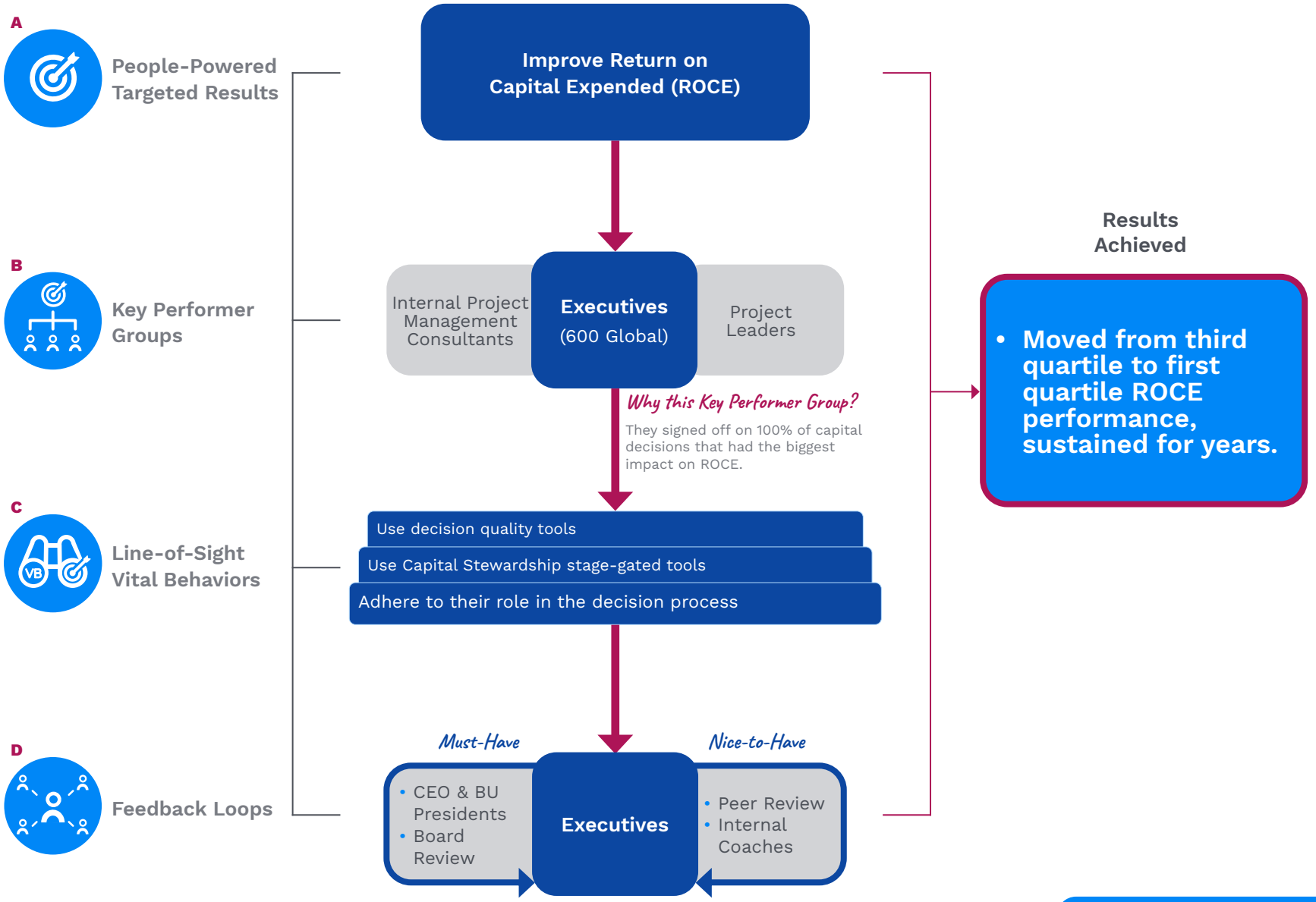
CASE EXAMPLE: OIL & GAS

AllyAssist



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CASE EXAMPLE: TELECOMMUNICATIONS

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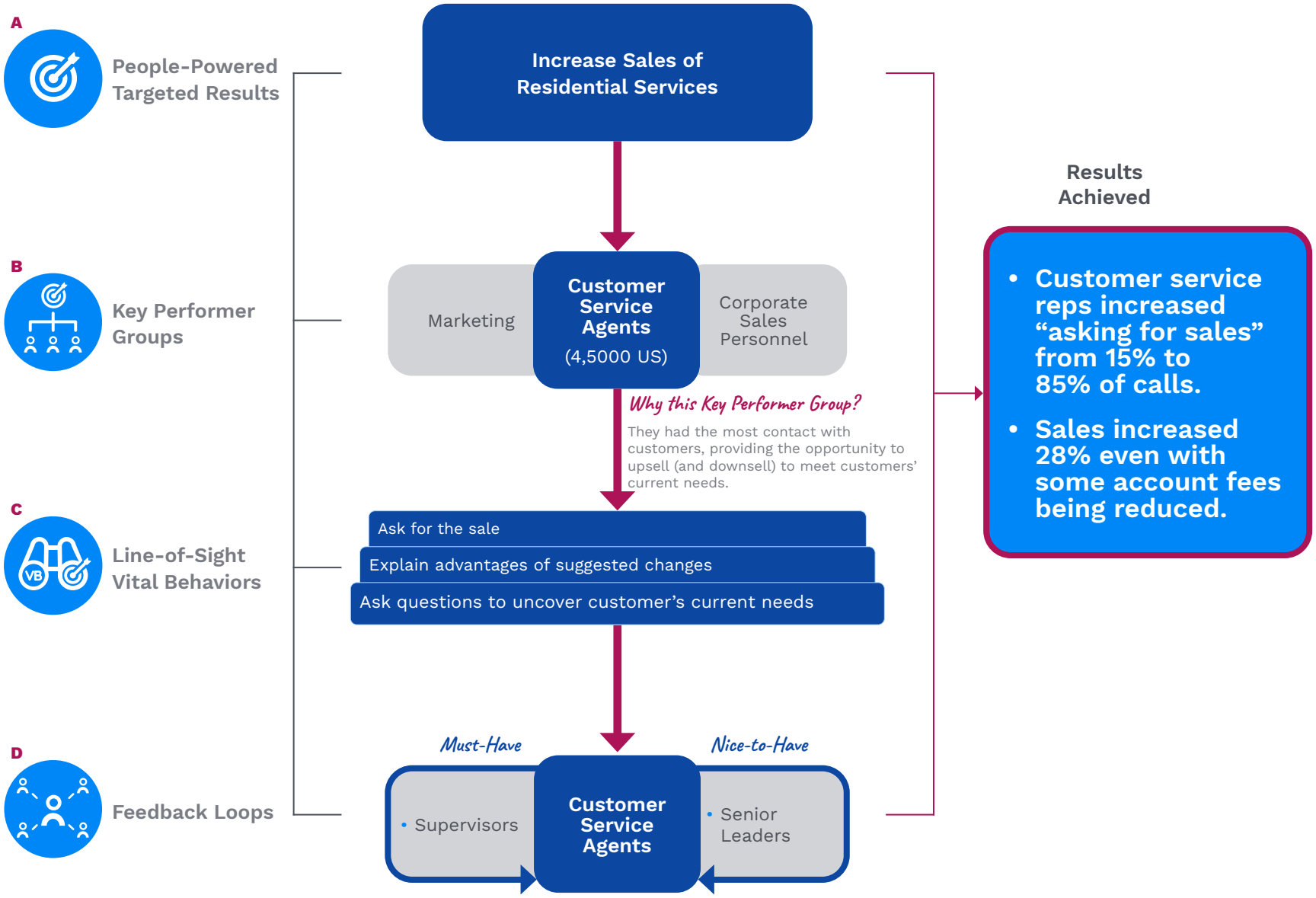

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