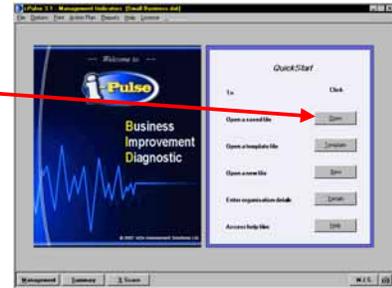




Rapid click through process to evaluate the i-Pulse program

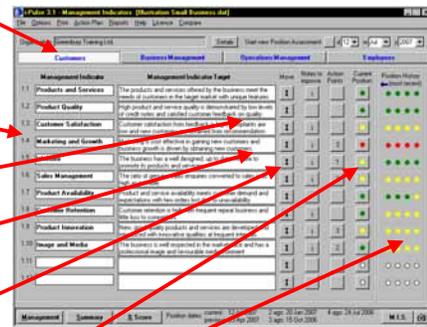
1. Open the program and the i-Pulse illustration file

1. **Click** through the initial screens
2. At the QuickStart screen **click Open**
3. Choose and **highlight** the **Illustration Small Business** file and **click Open**



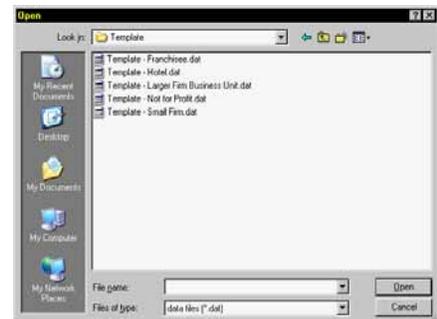
2. Review the features of the Management Indicators screen

1. The illustration file will open at the management indicators screen
2. Note the 4 perspectives (**click** to select)
3. Note the management indicators and targets for each perspective (max 12)
4. **Click Move** button to delete or move a management indicator
5. **Click Notes to Improve** button to make notes on improvement progress
6. **Click Action Points** button for Action Points feature
7. **Click Current Position** to score your management practice
8. Note previous scores can be shown



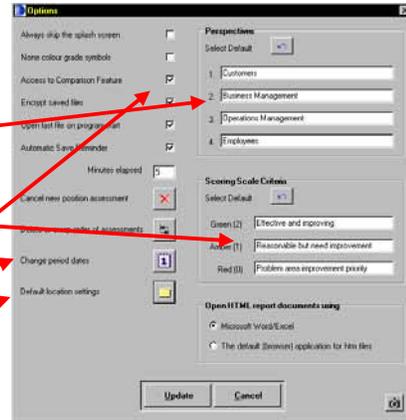
3. Note the range small organisation templates

1. Click **File** and then **Open Templates**
2. You will note that there are 5 templates
3. for small organisations:
 - small businesses
 - third sector organisations
 - hotels
 - business units of larger organisations
 - franchisees



4. Note the range of features that can be customised

1. **Click Options** on the top menu bar
2. Note that the following can be customised:
 - 4 Perspectives;
 - 3 scoring criteria;
 - access to the comparison feature
 - the order of the assessments;
 - location settings for files;



5. Review Overall summary screen

1. Click **Summary** to access the screen that summarises overall management score progress.
2. Note the score history for the last 5 events.
3. Note that improvement notes or action points are shown for the current file.
4. Click the camera icon to print the or save all, or part of, the screen image



6. Review % score screen

1. Click **% Score** to access the screen that shows the % score for each perspective and overall.
2. Note the % score history for the last 5 events.
3. Click the camera icon to print the or save all, or part of, the screen image

Perspectives	15 Aug 2007	08 Aug 2007	07 Jan 2007	02 Oct 2006	14 Jul 2006
Customers	76	68	65	65	65
Business Management	76	68	68	71	67
Operations Management	68	69	73	68	73
Employees	77	62	62	77	66
Overall	76	76	72	70	71

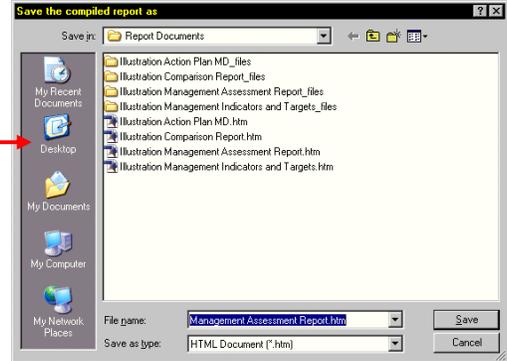
7. Record of Progress

1. Click the **Current Progress** button to score current management progress.
2. Click **Notes to Improve** to record progress on improvement.
3. Click **Action Points** to plan improvement action
4. You will be prompted to bring forward previous improvement notes and action points for a new assessment to enable these to be updated for a new assessment

Management Indicators	Management Indicators Target	Notes to Improve	Action Points	Current Progress	Progress History
41 Employees	The business has all the people required to meet the needs of the business with appropriate skills and experience.	1	1	1	1
42 Recruitment	The business is able to recruit people with appropriate skills and experience.	1	1	1	1
43 Diversity	Reasonable and equal opportunities.	1	1	1	1
44 Terms and Conditions	Reasonable and equal opportunities.	1	1	1	1
45 Qualifications	75% or more of employees have the qualifications they require to discharge their responsibilities and this is not below 75%.	1	1	1	1
46 Equal Opportunity	Equal opportunities provided for all employees and where appropriate clients.	1	1	1	1
47 Induction	Effective induction provided for all employees new to a site with no new hires below 75%.	1	1	1	1
48 Employee Development	Employee performance is assessed regularly with having needs been identified and having personal development measures.	1	1	1	1
49 Employee Satisfaction	Employee turnover shows that 75% or more of all employees are satisfied with their employment conditions.	1	1	1	1
410 Absenteeism	Employee absenteeism is less than 6% and not more than 10%.	1	1	1	1
411 Employee Turnover	The level of employee turnover is acceptable and better than average for the business sector.	1	1	1	1
412		1	1	1	1

8. Report Outputs

1. **Click Help>Report Documents** on the menu bar to access specimen reports.
2. **Highlight** the following self-explanatory reports and **click Open** to view
 - Illustration Management Indicators and Targets.doc
 - Illustration Management Assessment Report.doc
 - Illustration Action Plan MD.doc
 - Illustration Comparison Report.xls



9. Collation/ Comparison Report Outputs

(only for larger organisations with business units, or franchisors)

1. **Click Options** to select access to the Comparison feature and then click **Compare** on the menu bar to access the comparison feature.
2. **You cannot use this feature without a licence** but you can view typical reports from Report Documents as point 6 above.
3. **Click** Create Comparison Group to access the feature to create a comparison file for groups of business units.
4. With a group comparison file open **click Create Comparison Report** to create a report to compare the management performance of business units.
5. Note the history of management scores is also available

i-Pulse		Business Unit Comparison							
		Selection		Unit Comparison illustration - East Midlands dat					
Ref	Organisation	Avg	%	%	%	Derby	Leicester	Lincoln	Nottingham
Management Function					Jul 07	Jul 07	Jul 07	Jul 07	
	% for the organisation				54	78	92	69	
	% for Customers				50	79	93	79	
	% for Business Management				61	83	89	67	
	% for Operations Management				55	75	90	75	
	% for Employees				50	75	95	60	
1.1	Product Quality	100	0	0					
1.2	Customer Satisfaction	60	40	0					
1.3	Marketing and Growth	1	0	80	20				
1.4	Sales Management	1	20	80	0				
1.5	Availability	80	20	0					
1.6	Customer Retention	80	40	0					
1.7	Image and Media	50	40	0					
2.1	Leadership	1	20	90	0				
2.2	Business Plan	100	0	0					
2.3	Performance Management	100	0	0					
2.4	Risk	1	0	100	0				
2.5	Income	60	40	0					
2.6	Costs and Margins	80	40	0					
2.7	Trading Profit	80	40	0					
2.8	Insurance	100	0	0					
2.9	Comparative Performance	1	0	80	20				

10. Other features

This is a quick evaluation to demonstrate the main features of the *i-Pulse* program. There are numerous, but relatively minor, additional features to support these main features.

These can be viewed in the User Guide (pdf. format) or the Quick Tutorials (.ppt format) in the program or on the mini web site (<http://www.improver.co.uk/WelcometoiPulse.html>)