



Product Updates

September 2020

OpenBlend is a user led product. All updates and new features have been driven by user demand and designed with continual user feedback.

Launching to all users:

- [Viewing objectives](#)
- [Setting objectives with numerical values](#)
- [Updating progress for an objective with comments](#)
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Free modular feature – requires set up by company administrator

- [Tags](#)
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Viewing objectives

Our new objectives list:

- Allows increased visibility and easy navigation
- New search and filter function enabling users to find what the need quickly
- Clear markers of open actions associated with this objectives

Objectives view

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Objectives

Dashboard Wellbeing Blend **Objectives** Actions Notes Session Booking + Add action

Open Closed Filter tags Search

Objectives (2) + Add

Lead lean operations project delivery team

Started 03 Sep 2020 | Due 31 Dec 2020 | 17 weeks left

On track Company Objective 1 Open action

View Edit Update progress Close

Hire 4 new team members

Started 03 Sep 2020 | Due 01 Nov 2020 | 8 weeks left

Behind schedule Company Objective 2 Open actions

View Edit Update progress Close

RAG colouring replaced with green gradient

View, edit, update progress and close Objectives using the links

Search and filter functions

Count of open actions Showing for each objective



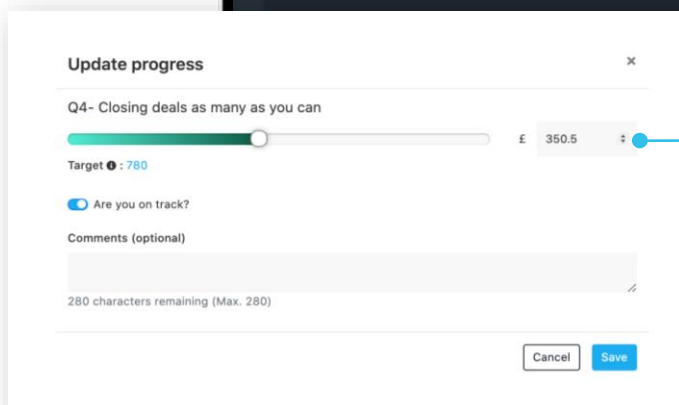
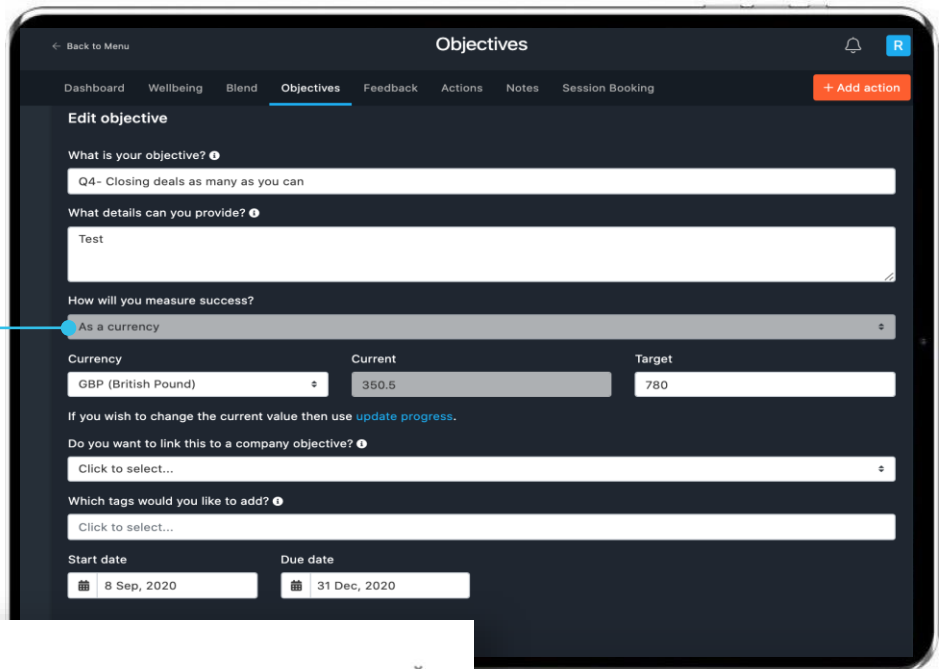


Setting objectives with numerical values

You can now create objectives with numerical values or currencies, as well as an upgraded percentage scale, to help track performance more effectively

Creating an objective with a numerical value

Users can choose how to measure success



When updating objectives progress can then be monitored





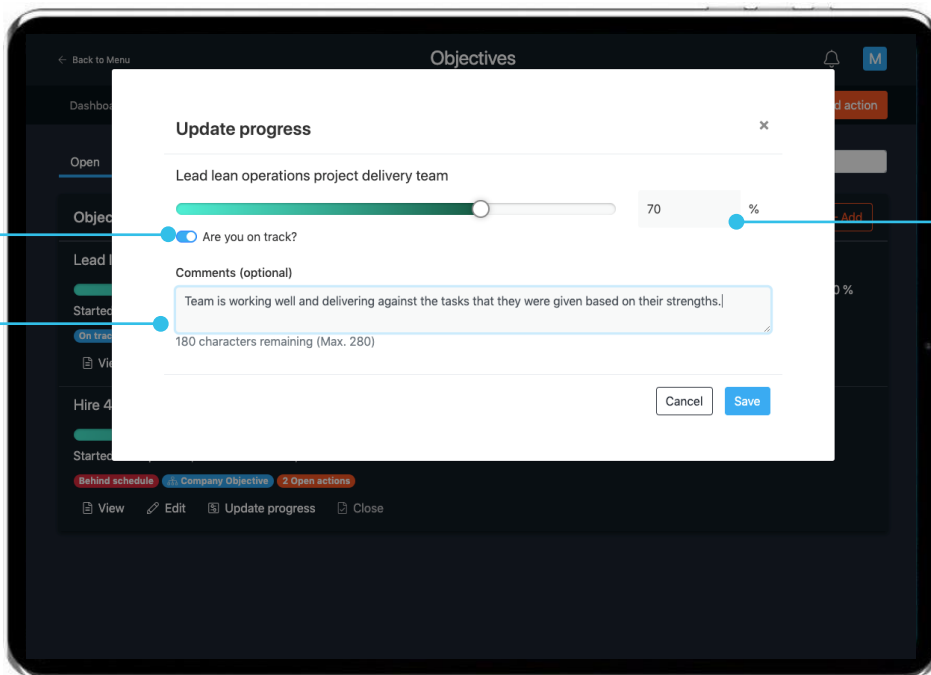
Updating objective progress with comments

- Users now have the option to enter a comment when updating objective progress
- All objectives now default to 'on track.' Users can toggle to 'behind schedule'
- An exact progress number can be typed into the update box
- It is now possible to exceed an objective target by entering the progress in the open text box next to the bar

Objectives – update progress pop up

When an objective is no longer on schedule toggle to 'behind schedule'

Comment to give updates context



Type in exact numerical values for progress updates & if target has been exceeded





Objectives history

- All updates are now recorded in your objectives 'Progress History'
- View when updates were made, who made them and any historical comments
- Use 'Progress History' to help facilitate reviews and performance over time

Objectives – progress history

View when updates were made, who made them and any relevant comments to help review and track performance

Current value	Target value	Date	Updated by
5		3 September 2020 11:59	Michael F.
Comments I was able to do really well on this objective. Booking in meetings with clients and senior leaders was much quicker than expected. I have now developed relationships with contacts in the Asia Pacific market.			
5		1 September 2020 09:50	Michael F.
4		20 August 2020 10:30	Michael F.
2		06 August 2020 14:17	Michael F.
0	5	01 August 2020 09:01	Michael F.



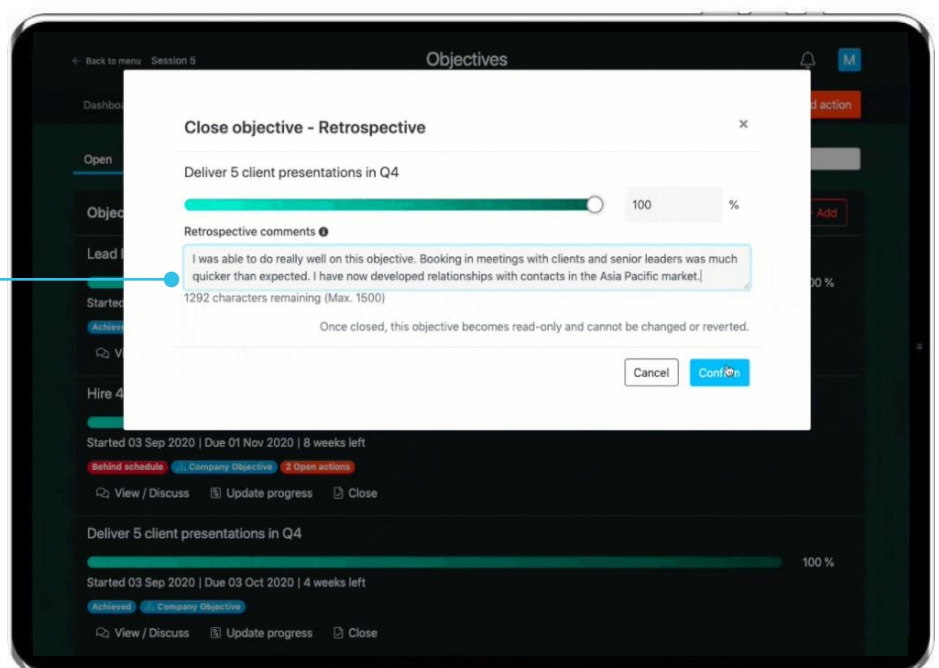


Closing objectives

- An objective can now be 'Open' or 'Closed'
- Note. All 'Archived' objectives will now be marked as closed and any objectives at 100% complete will be marked as 'achieved'
- When closing an objective a retrospective comment can be given to support tracking performance and future reviews
- A complete history of all closed objectives is easily accessed showing progress updates, actions and comments
- You will no longer be able to delete objectives. You should now close them and input the appropriate comment
- Objective progress can be updated to fully achieved/ exceeded at any time, but objectives can still only be closed in a session

Closing objectives

Comment when closing objectives siting how the objective has been delivered upon



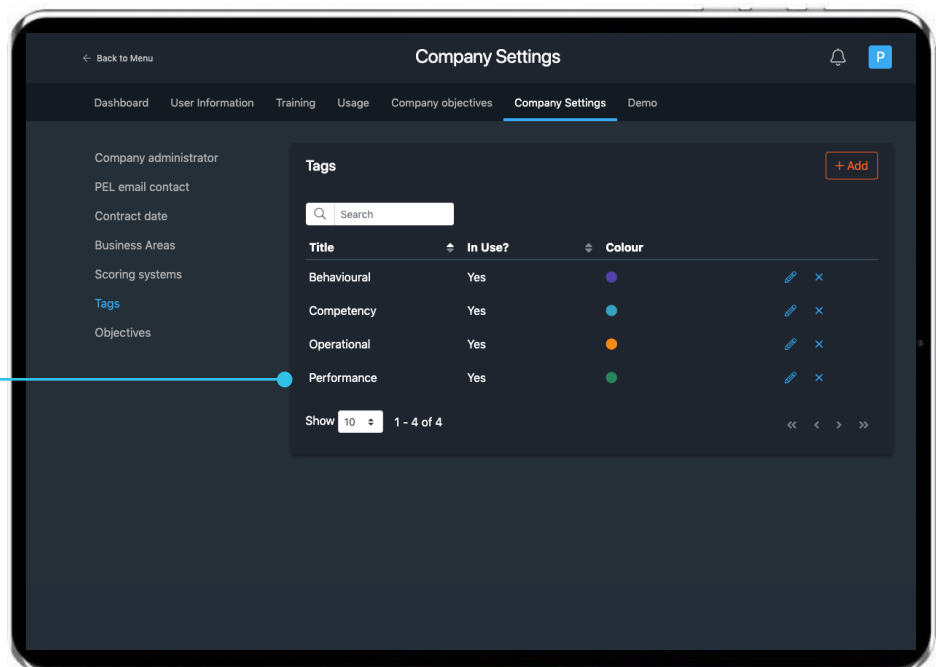


Tags

- Tags gives users the ability to organize and filter objectives
- Tags are bespoke to your company, enabling the flexibility to choose the tags that are relevant for you. Eg. 'Competency', 'Development', 'Project related.'
- Multiple tags can be selected for the same objective
- Tags is a free modular feature that can be set up by company administrators
- A tag that is in use can be deactivated by your company any time at which point it will no longer be available to users. However, current open/closed objectives will remain tagged with a deactivated tag

Tags

Tags are personalized by your company and colour coded for ease





Retrospective scoring

- Retrospective scoring means users can close an objective with a clear record of their achievements alongside a closing comment
- Retrospective scoring options need be created, in 'Company Settings', by the Company Admin in order to use the feature. Create a 'Scoring system' and then add it in the 'Objectives' area of 'Company settings'
- Enter the Retrospective options in the 'Descriptor' field. Examples of fields would be 'Exceed target', 'Achieved target', 'Missed target'
- As objectives cannot be deleted, it's advisable to add options for closing objectives that are 'No longer relevant' or 'Not applicable'
- Only one set of retrospective options can be used so make them relevant for all users

When closing an objective users are asked 'How well did you deliver on this objective?' They then select from the retrospective scoring options

