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**2014 Users Roundtable**

**New Performance Management Module – Jim Cardwell Presenting**

Since last year's Users Roundtable we have been actively working on finalizing the new Connections Performance Management Module.

We have put a lot of our own thinking into this solution, combined with feedback from our beta-testing group. The end-product is a simple, time-efficient, adult-to-adult process that will improve performance through focused employee coaching and development.  It will also provide information you can use to drive pay and promotion decisions.

Features that are part of this exciting new Performance Module:

* Dashboards for Organization, Department and Individuals Summarizing and Tracking
* Creating Organization, Department and Individual commitments and tracking results.  Also tracks Direct Report's commitments
* High impact metrics as well as health of other metrics
* Current project load, Project completions, Project progress composite, as well as Project Evaluation criteria and Project Team assessment results
* Progress on Department members' goals and personal development commitments
* Organization, Department, Project and Individual Dialog impact
* Individual Total Engagement scores (relationships within the organization, core values, and Basic Role performance)
* Individual Commitments
* Survey automatically sent at the end of a project to rate project team member contribution and effectiveness as well as whether project met its objective
* Survey on Employee's Contribution (relationships, core values, and Basic Role Performance) this survey will be filled out by the boss and employee
* Reports organized by the above factors

**Connections Online Performance Management Presentation**

* Dashboards/Starting Out – <https://files.connectionsonline.net/files/2014-Users-Roundtable/Dashboards-Starting-Out.docx>
* Dashboards Summary – <https://files.connectionsonline.net/files/2014-Users-Roundtable/Dashboard-Summary.docx>
* Personal Development Commitments Development Worksheets – <https://files.connectionsonline.net/files/2014-Users-Roundtable/Personal-Development-Commitments-Worksheet.docx>
* Sample Commitments – <https://files.connectionsonline.net/files/2014-Users-Roundtable/sample-commitments.docx>
* Please Note – <https://files.connectionsonline.net/files/2014-Users-Roundtable/PleaseNoterv2.docx>

**Dream Factory Solutions – DaLand Solutions Presenting**

* DaLand Solutions LLC (www.dalandsolutions.com) introduced a suite of "Dream Factory" solutions at our Users Roundtable this year to benefit COL Users by plugging into the Connections Online Web Services (COWS).

* PowerTools for Project Managers - The first application, referred to as "PowerTools," is a project management desktop/device native application designed to empower project management professionals and general COL gurus to more efficiently, effectively, and easily manage COL projects. Features of DaLand Solutions PowerTools will include: improved "at a glance" COL data management, insert tasks/sub-tasks at specified places in task lists, copy milestone or task 'buckets' or groups, edit Project Tasks and Follow-Up tasks simultaneously, link Follow-Up tasks to Project Tasks, enhanced search capabilities, and setting up task dependencies.  Additionally, the PowerTools application will provide project managers or PMOs with a "PMO Dashboard" to measure critical aspects of projects and provide graphical analysis of project tasks, resources, and overall health.

* Core Data Connector (to Symitar/Episys, DNA, etc.) - The second DaLand "Dream Factory" solution (which will be deployed and managed through PowerTools) will be a core data connector (i.e. to Symitar/Episys, DNA, etc.) to allow credit unions to query data directly from the host processor for automatic population and updating of critical metrics.

* Collaborate with other Credit Unions via a Collaborative Hub - Finally, have you ever considered just how much valuable information is stored on your COL site?  What if you could collaborate with other credit unions and share or exchange non-sensitive project, initiative, metric, or other information via an online collaboration hub?  Soon, your organization will not only benefit from your usage of COL, but you'll be able to learn from and participate in what others are doing within COL, among other exciting innovations.

**DCU, PowerTools and COL Aggregator – Presentation by DaLand Solutions**

<https://files.connectionsonline.net/files/2014-Users-Roundtable/COL-DCH-and-PowerTools.pptx>

**What’s Coming Up? - Presentation by Bryan Siders**

<https://files.connectionsonline.net/files/2014-Users-Roundtable/WhatsComingUp-Bryan.pptx>

**Best Practice Dialog Presentations by Attendees at the 2014 Users Roundtable**

* Workers’ Credit Union – A Year to Remember! <https://files.connectionsonline.net/files/2014-Users-Roundtable/WorkersCU-Dialog-Presentation.pptx>
* NASA FCU – Changing Dialog Dynamics <https://files.connectionsonline.net/files/2014-Users-Roundtable/NASA-Changing-Dialog-Dynamics.pptx>
* Credit Union of New Jersey – Dialog Practices <https://files.connectionsonline.net/files/2014-Users-Roundtable/CUNJ-Dialogs.ppt>
* Numerica Credit Union – Dialog Best Practices <https://files.connectionsonline.net/files/2014-Users-Roundtable/NumericaCU-Dialog-Best-Practices.pptx>
* Anheuser Busch ECU – Using Connections Online at ABECU/Quarterly and Monthly Dialog Meetings <https://files.connectionsonline.net/files/2014-Users-Roundtable/ABECU-Using-COL.pptx>

**Help: Connections Online Dialogs**

* Organization Dialogs – <https://files.connectionsonline.net/files/2014-Users-Roundtable/Org-Dialogs.docx>
* Project Dialog Agenda – <https://files.connectionsonline.net/files/2014-Users-Roundtable/Project-Dialog-Agenda.docx>
* People Connection – <https://files.connectionsonline.net/files/2014-Users-Roundtable/People-Connection-Individual-Dialogs.docx>

**Educational Webinars**<https://files.connectionsonline.net/files/Educational-Webinars-List.doc>