REVENUE PERFORMANCE
MANAGEMENT:
BUSINESS INTELLIGENCE FOR
THE RECRUITING INDUSTRY

RPM SAAS
QUICK START
GUIDE

R P/M
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WWW.RPM-USA.COM

WELCOME to the RPMS SAAS system. The RPM SAAS solution is a very comprehensive interactive program that tracks, analyzes and presents critical metrics data in an easy to use, clear concise format.   The RPM system was developed based on the premise that Recruiting is a science and that by having a system in place that provides up-to-date information on the key activity metrics used to measure success in performance , the data can be monitored and used to identify weak areas. Performance can then be dramatically improved overnight simply by targeting those weak areas and making changes as needed to achieve the desired results.

The RPM Quick Start Guide is an introduction to the RPM system and outlines the simple process for getting started with using the system. It will walk you through the steps for establishing goals, inputting data, viewing the results and it will give recommendations to improve individual and team performance based on the results of the data.

TO START

Step 1: Set Personal Goals (Establish your Road Map)

Begin the process by going to the LIBRARY page of www.rpm-usa.com. Print out the "10 Steps to Achieving Your Life Dreams" workbook and follow the steps to fill in the necessary information. This is an important first step as you have to know where you are going in order to get there. This information will be what drives you, providing the direction and the continued motivation for you to rely on to keep you on track.

Step 2: Determine Metrics Goals based on Desired Income

The RPM system includes a built-in calculator formulated to automatically figure out the specific metrics in each activity area based on the desired level of income you wish to achieve and certain variables that are unique to your skills. Go to www.rpm-usa.com and log in. Select the Calculator tab. Follow the directions for inputting the required numbers and information. Once all the data is entered, the calculator will automatically populate the activity metrics targets with numbers that correspond to the numbers needed in each area for you to achieve your annual income goal.
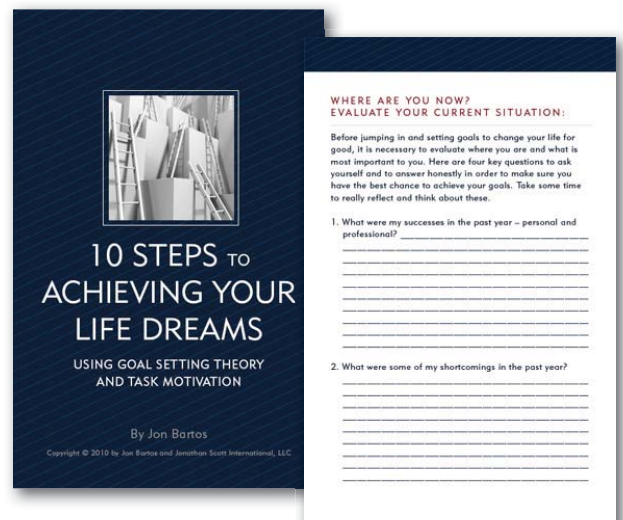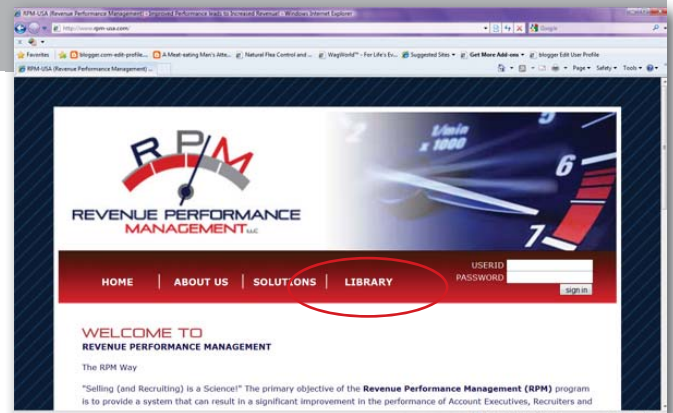
Step 3: Enter Metrics Goals from RPM Calculator

Once the metrics targets have been generated by using the RPM Calculator, the next step is to input the goal information. Select the GOALS tab. Simply input the metrics goals directly from the RPM Calculator in each appropriate category and hit "Update". If you do not track a specific Metric, leave it blank.

You are ready to now start inputting data for your dashboard!

Step 4: Data Entry

Schedule a specific recurring time to input your data each week. Many offices and recruiters input data either on Friday before they leave for the day or first thing on Monday morning for the previous week. It is critical that a consistent schedule be maintained and it is suggested that a time be set up via Microsoft appointment or using your internal recruiting software if available.

To input data, simply go to **www.rpm-usa.com** or **www.rpmdashboard.com** and log in. Go directly to the INPUT page. Record your numbers in each of the appropriate boxes that are located horizontally at the top of the page. When finished entering in all of the information, click the save button at the bottom left.

Changes: Should you make a mistake, you will have the ability to go back 1 week and make the correction. Managers will have the ability to go back 4 weeks to change numbers that were input incorrectly.

Now that you have established and entered your goals, it is time to use the dashboard and information to track your progress and improve your performance as needed.

TO VIEW RESULTS

At first glance, the RPM dashboard can be a bit daunting to the new user. Don't let it intimidate you. Once you become familiar with the various components, the value will become quickly apparent. The dashboard is designed to give you a visual presentation of the current and cumulative data in an easy to use, interactive format.

To get the most out of the Dashboard, the following order is suggested for viewing the information:

Step 1: Log into **www.rpm-usa.com** or **www.rpmdashboard.com** with your name and password
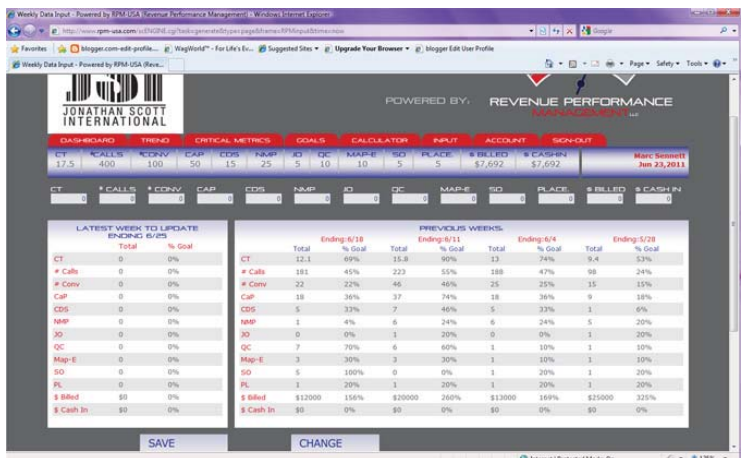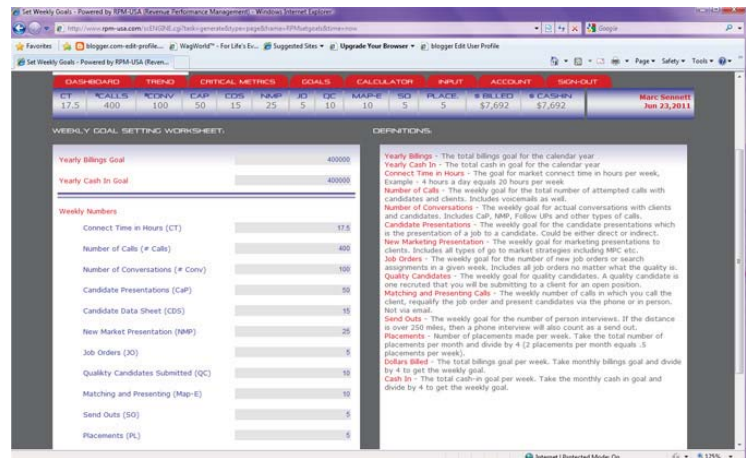
Step 2: The first page that will come up is the DASHBOARD page.

a. YTD Actuals. One of the first important variables to look at is where you are at in relationship to your annual goals. This can be viewed by looking at the YTD Cash In and YTD Billing Gauges located on the right side of the main dashboard page. Have a firm understanding of where you are based on your numbers for the year so far.

YTD BILLING:

50

25 — 75

0 — 100

$184,000
46% of Goal

52 Weeks Goal: $399,984
52 Wks Actual: $184,000
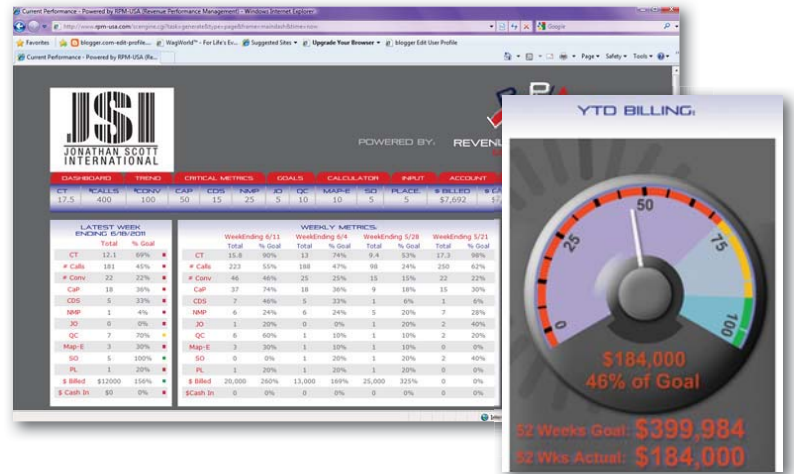
LATEST WEEK ENDING 6/25/2011

	Total	% Goal	
CT	17.3	98%	
# Calls	205	51%	
# Conv	48	48%	
CaP	34	68%	
CDS	10	66%	
NMP	10	40%	
JO	1	20%	
QC	3	30%	
Map-E	4	40%	
SO	2	40%	
PL	0	0%	
$ Billed	$0	0%	
$ Cash In	$0	0%	

b. Weekly Metrics - Most Recent. View the table labeled Latest Week located on the left side of the dashboard page. This shows your performance for the previous week. Begin at the top and look at each metric in succession to understand how you did versus your goals. If you achieved 100% or more of your goal, there will be a green square next to the number. If you achieved between 75% and 100% of your goal, there will be a yellow square next to the number. Anything below 75% will be designated with a red square. Any metric that is marked with a red square indicates an area that potentially may need attention.

For each metric, it is important to have a firm understanding of where you ended up in relationship to your goal. If you missed your goal, ask yourself the following questions:

• What were the reasons that caused me to miss my goal for this metric?
• What do I need to do next week to hit my goal that I set?

Continue with this analysis for all the metrics on the Latest Week Section.

WEEKLY METRICS:

	WeekEnding 6/11		WeekEnding 6/4		WeekEnding 5/28		WeekEnding 5/21	
	Total	% Goal	Total	% Goal	Total	% Goal	Total	% Goal
CT	15.8	90%	13	74%	9.4	53%	17.3	98%
# Calls	223	55%	188	47%	98	24%	250	62%
# Conv	46	46%	25	25%	15	15%	22	22%
CaP	37	74%	18	36%	9	18%	15	30%
CDS	7	46%	5	33%	1	6%	1	6%
NMP	6	24%	6	24%	5	20%	7	28%
JO	1	20%	0	0%	1	20%	2	40%
QC	6	60%	1	10%	1	10%	2	20%
Map-E	3	30%	1	10%	1	10%	0	0%
SO	0	0%	1	20%	1	20%	2	40%
PL	1	20%	1	20%	1	20%	0	0%
$ Billed	20,000	260%	13,000	169%	25,000	325%	0	0%
$Cash In	0	0%	0	0%	0	0%	0	0%

c. Weekly Metrics Cumulative. Next, view the Weekly Metrics Section on the main dashboard page. This is located to the right of the Latest Week Section and reflects the cumulative results from the past 4 weeks of activity. The Weekly Metrics section allows the user the ability to look at the past 4 weeks of performance to see if improvement is taking place. Take a moment to locate the areas where continual improvement is taking place and celebrate. This will show areas of strength. More importantly, locate the metrics

that do not show improvement. Use the RPM coaching strategies to implement changes to increase performance in these weak areas.

IMPORTANT NOTE: No one has the ability to work on more than 2 metrics per week for improvement let alone 10 metrics at a time. The best method for increasing performance is to start at the top and work your way down. Focus on achieving the initial activity metrics such as Connect Time, # of Conversations and # of Calls before moving down to the other metrics. It is imperative to understand that the initial activity goals need to be achieved first on a consistent basis before any of the remaining metrics targets have a chance of being reached. Once the initial metric goals are met, continue to move on down the list and focus on the next one.
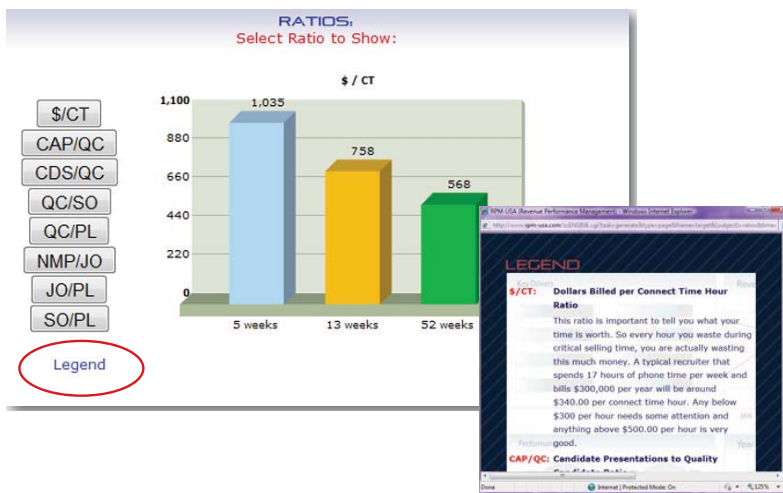
d. Ratios. Once data has been entered for a few weeks, the Ratios Section at the bottom center of the page will start to calculate and show results. The user has the ability to click on each ratio button in this section and the appropriate graph will be displayed for that specific ratio. For a definition of each ratio, click on "legend" at the bottom.

e. Trend. Equally as important as looking at the numbers and where you stand in relation to your goals is the ability to see trends that are taking shape based on the cumulative data that has been entered YTD.

To view this extremely valuable information, simply click on the TREND tab. There are 4 main sections included:
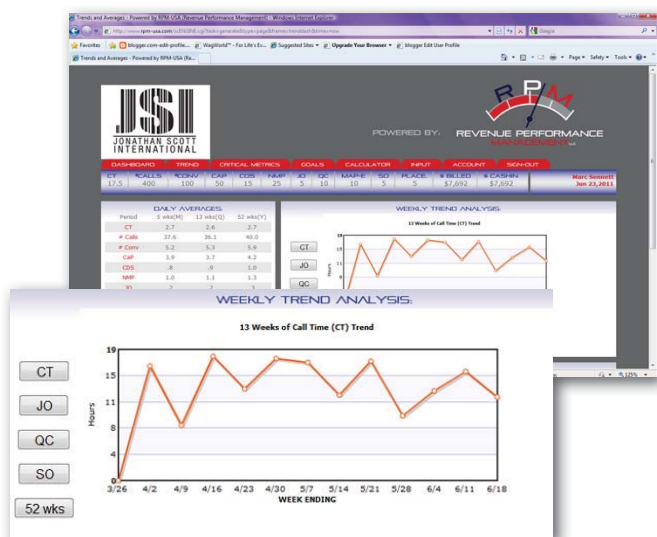
1. The Daily Averages section, which shares your daily averages for all your tracked metrics

2. The Weekly Trend Analysis section, which shows an interactive trend line for each of the 4 major metrics with the option of looking at both a 13 and 52 wee timeline.

3. The 5 weeks Progress section, which gives an interactive look at the last 5 weeks time frame for each of the 4 major metrics

4. The Cumulative Metrics section, which provides data on how well the office or individual is performing to goal on "all" tracked metrics displayed over a 5 week (month), 13 week (quarter) and 52 week (yearly) basis.

Performance Improvement

The entire RPM system is based on the premise that recruiting is a science and that one can in fact alter their performance dramatically by simply taking a look at the critical recruiting metrics, evaluating the data and trends and making immediate changes to the weak areas that are highlighted by the system. Once the user has a firm understanding of where the numbers are tracking and what exactly needs to be improved, it becomes simply a matter of implementing the steps needed to enhance performance in each of the weak areas.
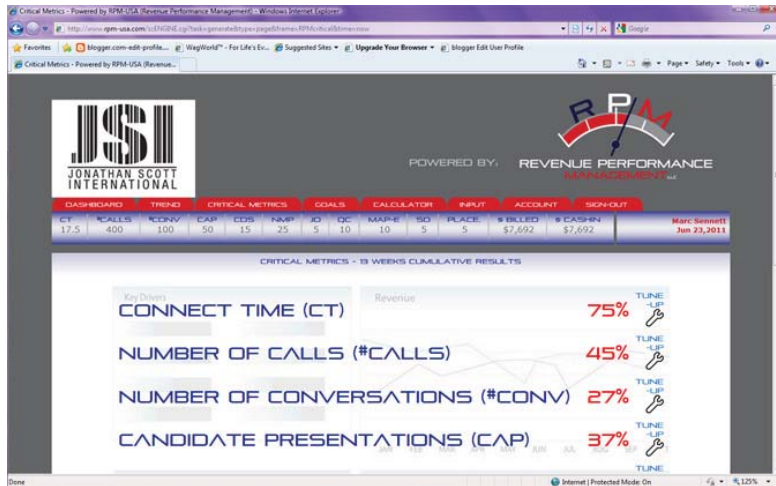
The RPM system makes this easier than ever by giving the user a snapshot of any of the specific critical metrics that are not in line with their goal achievement. This can be viewed by selecting the CRITICAL METRICS tab. The Critical Metrics page shows a 13 week view of all the metrics (including ratios) that are below 75% of the goal.

As mentioned in the NOTE above, it is important to begin at the top and select 1 or 2 metrics at a time to work on. To gain insight on how to improve a specific metric, click on the Tune-Up Wrench (Picture) on the right side of the metric you want to develop. There will be a pop-up box that comes up and shares helpful tips on how to increase that specific metric immediately. There will also be a section below the tips that will provide additional training and development resources for increasing skills in that area.

If the individual or team performer is above 75% for any of the metrics or ratios for the last 13 weeks, that metric will not be shown on the Critical Metrics page.

Time to get started!

Our goal at Revenue Performance Management is to help you achieve a thorough understanding of the critical recruiting metrics and the science of how the metrics interact to play a role in your success. Recruiting is not rocket science; it's simply a science and one that can easily be mastered using the RPM system!

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