

# AXY OKR FEATURES

Let your team be creative and innovative, recognize their achievements and watch how this increases your business results.  
 With **Axy OKR for Salesforce** you can do this, and more.

## OKR MANAGEMENT

OKRs Management module helps to ensure the company focuses efforts on the same important issues throughout the organization.

This module contains all necessary features to ensure the right adoption and use of OKRs in your Salesforce organization delivering Alignment, Tracking and Focus.

### FEATURES

### VALUE

<b>Company Goal</b>	Strategic Company Level	<b>Strategic Alignment:</b> A unique way to share a common yearly Goal
<b>Alignment View</b>	Tree View List View	<b>Alignment View:</b> Best way to understand your team collaboration and alignment
<b>OKRs Supported Types</b>	Company Team Individual	Set OKRs for each organization level
<b>Objective Statuses</b>	Achievement Time General	Track Achievement, Time progress and General Status
<b>Forecast</b>	Forecast Achievement	Unique automatic way to forecast achievement
<b>Objective Owner</b>	Person Team & Collaborators	Clear ownership means clear responsibility
<b>Teams Support</b>	Collaboration Team Name	Flexible way to share ownership on an Objective



<b>Progress Tracking</b>	Automatic	Objective progress measure by Key Results metrics
<b>Progress Automatic</b>	Report Binding	Unique Feature for base progress on real result
<b>Progress overdue</b>	Notifications	Keep on eye on due date
<b>Closing Objective</b>	Close Score Self Assessment	Get feedback and Learn by scoring your OKRs each cycle
<b>Cloning Objectives</b>	Clone	Save time
<b>Wizard to start</b>	Company Goal & Periods & CEO OKRs	Setup your year strategy in less than 1 minute
<b>Quick KR creation</b>	Quick KR	Adapt your OKRs at glance without losing time.
<b>Convert KR to Child Objective</b>	Convert KR	Push for alignment in the Tree view by converting your manager KR into your own OKR
<b>KR Supported Types</b>	Number Currency Activities/Milestone	Measure Results or Activities
<b>KR Reduce Type</b>	Inverse Type KR	Measure inverse progress
<b>Visibility</b>	Private(Collaborator) Public	OKR are public by default but private Objectives are supported
<b>Check in frequency</b>	Weekly - customize	Easy weekly recap
<b>Check In wizard</b>	Check In wizard	Mobile first experience for recap your week
<b>Check in remainder</b>	Notifications	Push notifications and Email
<b>Check In Tracking Report</b>	Employee engagements tracking	Understand who is engaged
<b>Following OKRs</b>	Follow Chatter	Following is key to correct ontime any change.
<b>Analytics</b>	Execution Dashboard  Planning Dashboard Wrap-up Dashboard	The power of data to understand your organization's progress towards a Goal from many perspectives.  Data to ensure alignment on time Data to push for learning
<b>Custom Analytics</b>	Custom OKR Reports	
<b>Planning Cycles</b>	Period	
<b>Export Reports</b>	CSV and Excel	Share your reports with useful file extensions



## COMING SOON FEATURES

## VALUE

<b>My Focus</b>	Strategic-Tactic and execution module	Access to your weekly tasks in a simple mode
<b>Objectives Unlinked</b>	Person Team & Collaborators	
<b>Wizard for creation OKR</b>	Company OKRs	Setup your Objectives in less than 1 minute
<b>Wizard for creation KR</b>	Team OKRs	Setup your Key Results in less than 1 minute

## TASK MANAGEMENT

With OKRS the company staff has a clear understanding of their tasks and responsibilities. A simple and clear visualization mixed with priority settings let the users navigate through their tasks, solve them or ask for assistance. In an OKR system, the staff can look at everyone's goals and seed collaboration.

## AVAILABLE FEATURES

## VALUE

<b>Tasks</b>	Complete Tasks	Organize your activities with the right context
<b>Collaboration</b>	Salesforce Chatter	Use the power of Chatter to interact with your team
<b>Key Result Task Binding</b>	KR TODO Type	Track Activities progress using To-Do typed Key results
<b>List Views</b>	List Views / Home component / My Focus	Organize your daily basic work
<b>Visibility</b>	Managed by Objectives	Manage your tasks privacy
<b>Week View</b>	List of week priorities	My focus week your attention on what matters
<b>Integration</b>	Outlook & Gmail & More	Sync your tools
<b>Reminders</b>	Events & Task Due date	Never miss a deadline

## EMPLOYEE MANAGEMENT

Axy OKR also includes tools and features to handle the Employee interaction and organization to improve based on clear goals, the communication, the transparency and the engagement.

Helping the Employee to identify clearly who and how is contributing to the company success and professional development by tracking a career path, performing recognition and rewarding the committed employees.

AVAILABLE FEATURES		VALUE
Newsfeed	Chatter	Use the power of Salesforce Chatter to interact and be connected with your team
	Polls & Q&A	Ask for feedback using polls or questions and answers
Team/Hierarchy Management	Role Hierarchy	Manage your organization hierarchy in a clear and secure way
Employee Profile	User Profile	Share who are you
Pulse	Weekly Check In	Know how your employees are feeling
Engagement Analytics	Engagement Dashboard	Track real time the team engagement with your organization
Gamification	Recognition & Awards & Rewards	coming soon
Career Path	coming soon	
Resource Planner	coming soon	
Onboarding	coming soon	



## PERFORMANCE MANAGEMENT

OKR foundations are alignment, focus, tracking and learning. As part of CFRs, Performance Management helps to be clearly aligned with and keep a constant track on transparent feedback to help on learning.

One on ones and Quarters 360 Reviews are the basic manager tools to help the employee improve.

With AXY OKR the employees and managers can review cycles, scores and receive feedback. With this type of performance management solution the managers can track and focus all the employee's work.

### AVAILABLE FEATURES

### VALUE

1.1 Management	One on One module	Improve the communication by regulars and focus meetings
Reviews Cycles	Periods & Dashboard	Get the most from OKR by Planning, Executing and Learning iteratively
Review 360	coming soon	
CFR Analytics	coming soon	
Custom Queries for Review	coming soon	

## INTEGRATIONS

Since our application is built 100% using Salesforce native technology, we inherit most of Salesforce default capabilities such as Integrations. Each element of Axy OKR is exposed to be integrated with API's or SDKs.

In addition to that powerful platform, there are hundreds of enterprise level applications for integrate almost anything to Salesforce and be exposed into Axy OKR.



### AVAILABLE FEATURES

### VALUE

<b>Salesforce Standard</b>	Free Full API Rest / SOAP / Bulk	Our platform is API First exposing all our functionality to integrate and extend your data
	Mobile SDK Google / Dynamics / MS Teams	Several programming languages are supported
	JIRA / Trello	Integrate to help all your teams work better together
	Mulesoft & Connectors	Use the power of standard connectors to integrate your legacy systems with Salesforce and get real-time tracking on your OKRs



## CUSTOMIZATIONS

As part of Salesforce native solution, we have power to customize Data, User interfaces and business logic to adapt our tool to each and every company workflow. That is key to implement properly OKR practice adjusted to your business.

AVAILABLE FEATURES		VALUE
<b>UI</b>	Layouts & Views and more	Customize the way to visualize the information for your particular needs.
<b>Data</b>	Fields and Formulas	Add new fields to support particular needs for your organization on top of our platform
<b>Business Logic</b>	Flows & Custom Code	Customize your particular business logic by creating Workflows on top of Axy OKR
<b>Security</b>	Profiles and Roles	Customize the level of security you need to share properly the OKR and Employee sensitive information

## SYSTEM SECURITY

Salesforce is the most trusted customer relationship management (CRM) platform. In order to be a certified Salesforce ISV (Independent Software Vendor) company strict partnership requirements should be complied, including periodic security reviews.

Since our application “runs” within your organization we support this security and system features.

### AVAILABLE FEATURES

### VALUE

<b>SSO &amp; 2FA</b>	Delegate and Federate authentication	Secure and simplify the access using single sign on and two factor authentication
<b>Mobile support</b>	Salesforce Mobile IOs and Android Offline support	Access anything from anywhere anytime
<b>Security</b>	Salesforce high enterprise level Redundancy Backup Audit	For more information access our section about Security
<b>Multilang</b>		Multiple languages enabled.
<b>Multicurrency</b>		Multiple currencies enabled.