



C-VAL

CEO Performance Evaluation Solution



Case Study

State Credit Union

“ Streamlining executive performance evaluation with Microsoft Power Apps ”



Performance Tracking



Evaluation Reports



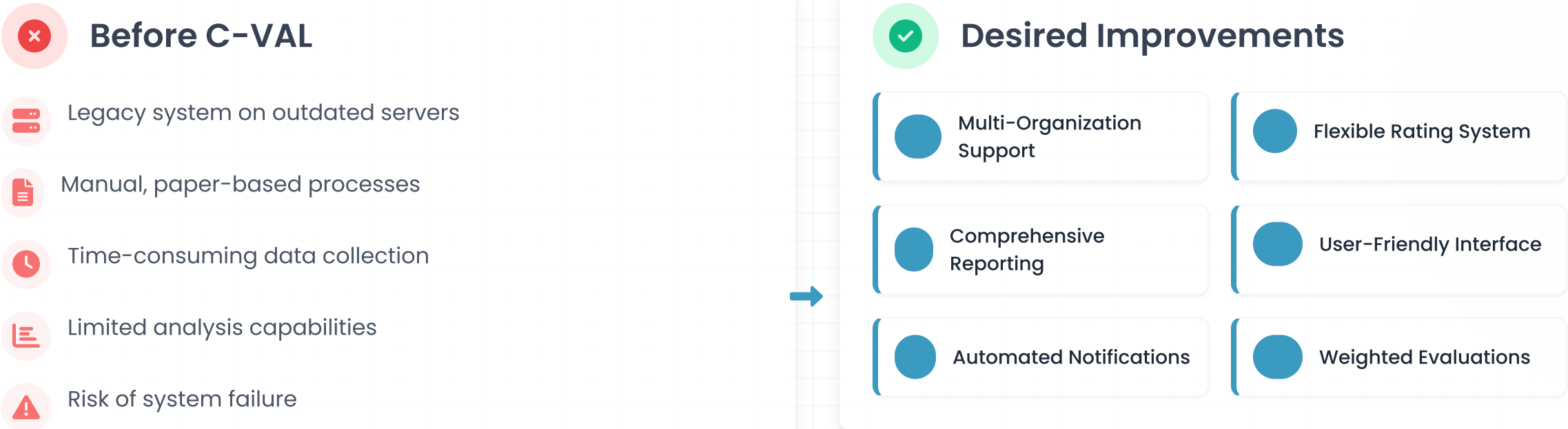
Board Management




Powered by
Microsoft Power Platform

The Need for a Modern CEO Evaluation System

A State Credit Union needed ESW to replace their legacy CEO evaluation system due to server retirement, while improving the entire evaluation process.





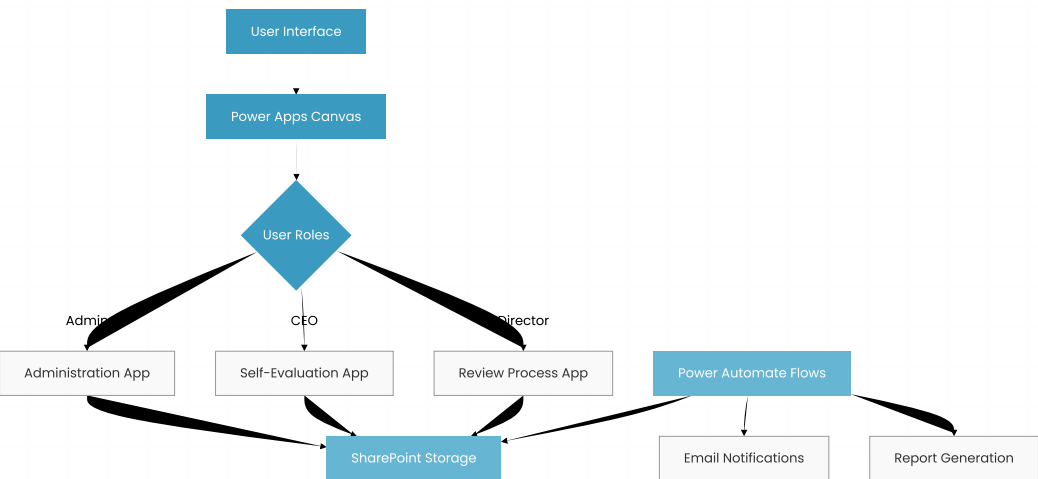
Solution Goal

Create a seamless, efficient evaluation process that streamlines board management and CEO performance reviews

Solution Overview: C-VAL

A comprehensive Microsoft Power Apps solution that streamlines the CEO performance evaluation process across multiple organizations with customizable frameworks built by a US team.

Technical Architecture



Technical Components

- 2 Canvas Applications**
User application and Admin application
- 10 Power Automate Flows**
Email notifications and report generation
- SharePoint Data Storage**
Secure data storage with proper delegation

Key Solution Components

- Multi-Organization Management**
Manages evaluation processes across multiple organizations with distinct configurations.
- Role-Based Access**
Tailored interfaces for CEOs, Directors and Administrators with appropriate permissions.
- Customizable Framework**
Flexible objectives, competencies and rating scales that adapt to each organization's needs.
- Automated Workflow**
Streamlined process from CEO self-evaluation to board reviews with automated transitions.
- Comprehensive Reporting**
Detailed evaluation reports with summaries and ratings that highlight CEO performance.
- Secure Evaluations**
Controlled access to sensitive evaluation data with appropriate permission levels.

Key Features

A comprehensive CEO evaluation system with flexible user roles, customizable criteria, and streamlined workflows. ESW leverage their roadmap process to architect this complex solution.

User Roles & Workflow



- CEO Self-Evaluation**
Initiates the process with ratings and comments on objectives and competencies
- Board of Directors Review**
Reviews CEO self-evaluation and provides independent assessments
- Administrator Management**
Manages the evaluation cycle, users and generates reports

Evaluation Process



- Customizable Objectives**
Example: Non-Interest Income Growth - 25%
- Leadership Competencies**
Example: Visionary Leadership - 16.67%
- Flexible Rating Scales:**
 - Exceeds Expectations
 - Meets Expectations
 - Needs Improvement
- Comments and qualitative feedback

Administration & Reporting

CEO Performance Report

Overall Rating: 3.5 - Meets Expectations

Objectives: 4.2 - Exceeds Expectations

Competencies: 3.8 - Meets Expectations

- On-Demand Reports**
Generate comprehensive evaluation summaries
- Evaluation Cycle Management**
Configure annual review periods and timelines
- Automated Notifications**
Email reminders for evaluation deadlines
- Secure User Management**
Role-based permissions and access controls




💡 Intuitive design for users with varying technical expertise

🏗 Built with Microsoft Power Platform

Technical Implementation


Overcoming technical challenges to deliver a robust, user-friendly CEO evaluation platform

Technical Challenges




Data Analysis Complexity
Generating Excel workbooks for data analysis using Power Automate and Excel Online scripts

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Incomplete Data Filtering
Ensuring objectives without answers aren't included in calculations

...



Report Generation
Extracting data as images and creating organization-specific Word documents

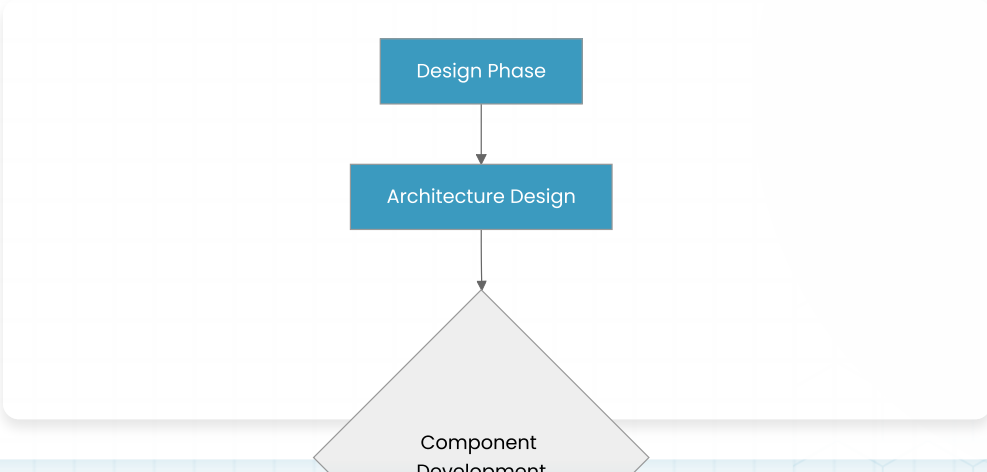
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User Experience Design
Creating an intuitive interface for users with varying technical expertise

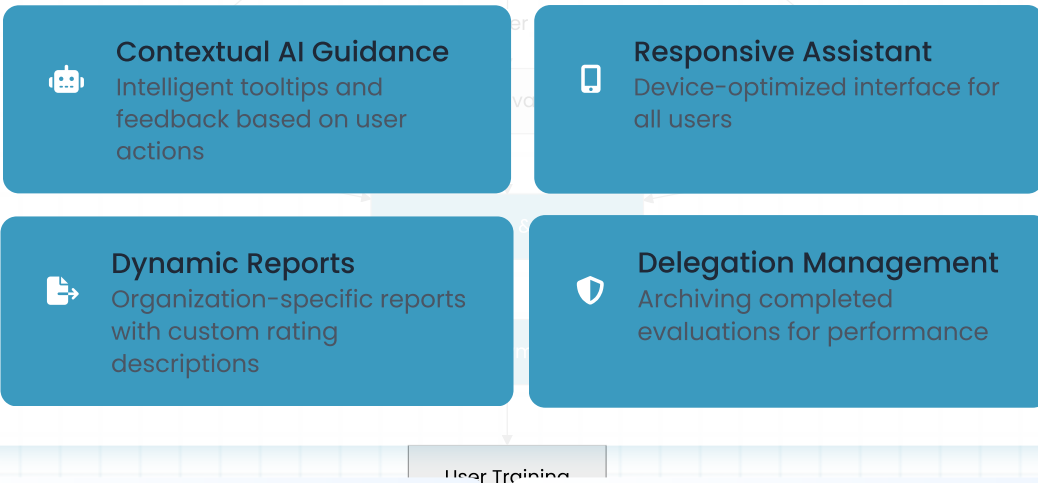
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Implementation Approach




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graph TD; A[Design Phase] --> B[Architecture Design]; B --> C{Component Development};
```


Solution Innovations




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graph TD; A[Contextual AI Guidance] --> E[User Training]; B[Responsive Assistant] --> E; C[Dynamic Reports] --> E; D[Delegation Management] --> E;
```




Performance Optimized
Efficient data handling for quick response times



Fully Accessible
Designed for users of all technical abilities




Scalable Solution
Supports multiple organizations with unique needs



Enhanced Analytics
Comprehensive evaluation reporting and insights

✓ Successfully deployed and in active use at Farm Credit of Southern Colorado

 100% Microsoft Power Platform solution

C-VAL Interface Showcase

A visual tour of the C-VAL application's intuitive interface and key functional screens

Multi-Org Support

Timeline Management

Administration Home Dashboard

#	Organization	CEO	Status
12	FCS of Mandan	CEO Name	Automated workflow with clear status tracking
17	State Credit Union	CEO Name	
18	Test Jan 24	CEO:	Active

Evaluation Cycle Management

Farm Credit of Southern Colorado 2023

View and manage multiple performance evaluation for Jan 01, 2023 - Dec 31, 2023 is in progress

Self-evaluation due date: 1/15/2025

Self-evaluation completed 1/21/2025

CEO Tracking

Automated Notifications

Rating System

Competencies Evaluation

Visionary Leadership

- Has a clear vision for the business
- Maintains a long-term view

Rating: Exceeds Expectations

Organization Users Management

Directors

Director Name Active

Director Name Active

+ Add Director

Role-Based Access

Weighted Criteria

Objectives Management

Objectives

Weight Total: 100%

Non-Interest Income Growth 25%

Develop a plan to target alternative revenue sources

Strategic Plan 30%

Feedback Capture

Secure user management with role assignments

Customizable objectives with weighted scoring

Evaluation Process Flow



CEO Self-Evaluation
Initiates the evaluation process



Board Review
Directors provide feedback




System Calculation
Weighted score computation

Results & Conclusion

C-VAL has transformed CEO evaluation processes at State Credit Union, delivering time savings and improved insights by ESW staff. An optional support agreement for future updates was agreed upon.

Key Improvements





Time Saved
85%




User Adoption
100%

Client Testimonial

"The C-VAL system has streamlined our CEO evaluation process dramatically. What previously took weeks of paperwork and manual calculations now happens seamlessly with clear visibility for all parties involved. The board members particularly appreciate the intuitive interface."

Board Chairperson
State Credit Union



The solution's multi-organization capability has become a model for other Farm Credit associations looking to modernize their evaluation systems

Strategic Alignment

Improved alignment between CEO performance metrics and organizational strategic objectives



Board Empowerment

Enhanced board participation with better tools and data for informed decision-making



Technology Modernization

Successful transition from legacy systems to a modern, cloud-based solution



Conclusion & Future Outlook

The C-VAL solution has successfully met all project objectives, providing State Credit Union with a modern, efficient CEO evaluation system. The Power Platform implementation delivers ongoing value through:

Annual evaluation cycles

Multi-organization support

Comprehensive reporting