

Service definition

Perform like you.

Everything you need to know to make an
informed decision about your employee
performance management provider.

Delivered by **essential** ©



What is Perform365 from Zensai?

Perform365 is a performance management solution designed to provide employees with clarity on expectations and equip managers with the tools to support and coach their teams to achieve their highest potential.

Built on best practices for performance management, Perform365 offers:

- Clear goals for each employee.
- Frequent feedback between employees and their managers.
- Alignment between organisational, team, and individual goals.
- Managerial support to address blockers and ensure progress.
- Insights and dashboards for performance across teams, as well as talent mapping insights.

Set organisational goals and empower managers to utilise them, along with OKRs and SMART goals, to align their teams with business objectives. Keep up with engagement, performance, and goal outcome with a frequent digital 10-mins check-in between employees and their manager. Gather feedback from peers, managers and leaders or from external sources for customer or supplier feedback. Automated invitations for periodic one-to-one and performance discussions ensure consistency, with each conversation informed by data from the previous period. Get insights from across the organization to map future talent needs and improve team performance.



Perform365 is available as an app in Microsoft Teams, on mobile, and on web.

21%

increase in
productivity

40%

increase in
retention

37%

decrease in
absence



Finance (51-1000 employees)

"I always hated performance reviews until Zensai made it breezy and chatty"

[Read the full review on G2](#)



Head of HR & Development (51-1000 employees)

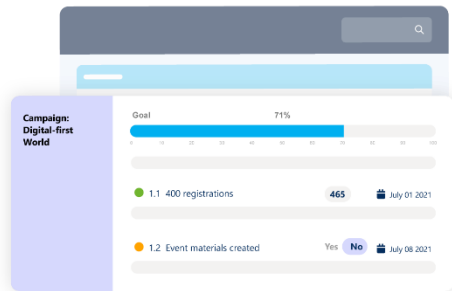
"A powerful, effective way to get insight into your team"

[Read the full review on G2](#)

How Perform365 works.

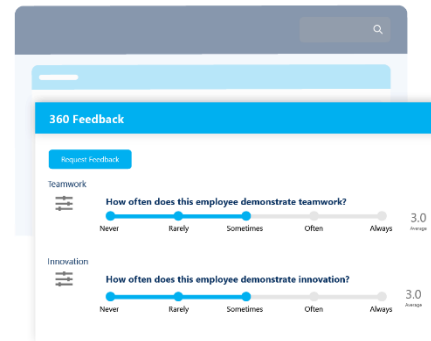
1

Individual goals/OKRs:
Clear and aligned to business objectives and guided by AI suggestions.



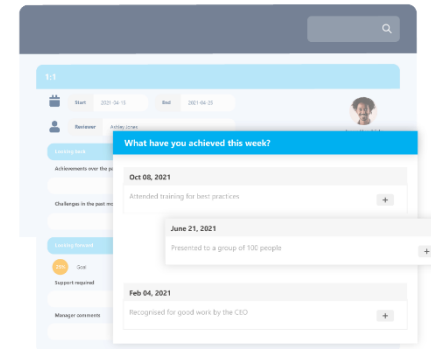
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Feedback:
Get a holistic perspective for conversations via frequent feedback between employees and their managers as well as 360° feedback from internal and external sources.



3

Performance:
Up to 90% less admin for performance management, reviews and ad-hoc conversations. Employ AI summarized performance reviews for further automation.



4

Analytics and dashboards:
Give accurate performance and talent insights and get the full picture fast with AI powered analytics.



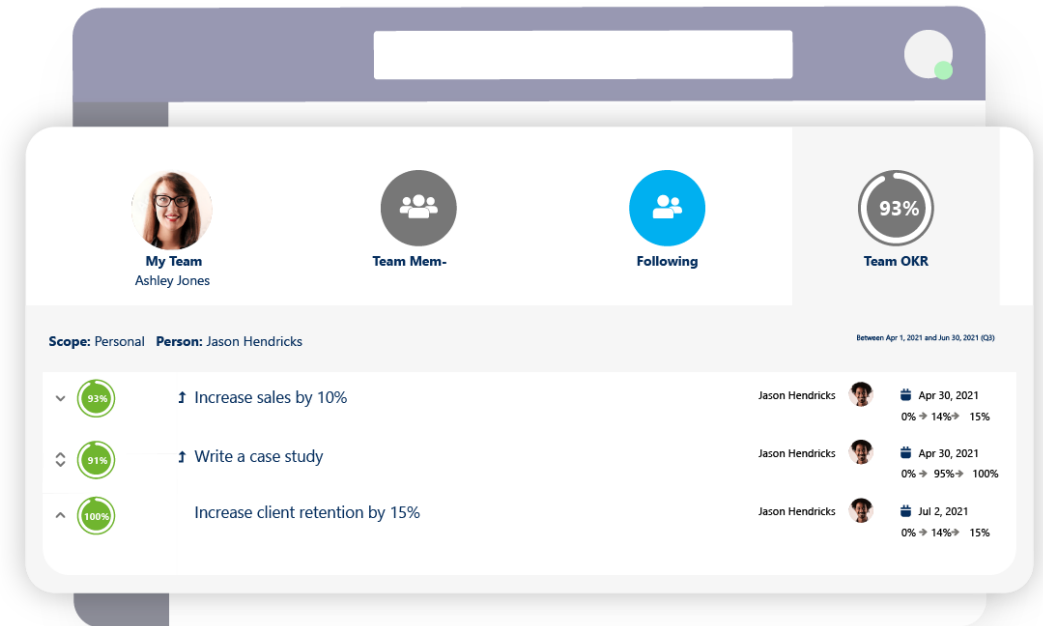
What you get with Perform365.

Performance management

- **Frequent digital 10-mins check-ins:** Keep up with engagement, performance, and goal outcome via between employees and their manager.
- **Reduce review prep time by 90%** with check-in history. Add to that, our AI-summarised performance reviews to further diminish planning efforts.
- **Run manager/employee 1:1s.**
- **Run efficient workflow-based processes** for all reviews.
- **Flexible templating** allows wide variety of performance related questions and summarises regular check-ins.
- **Capture 360° feedback** from internal and external sources.
- **Full analytics suite** for visualising and analysing performance.
- **Talent mapping tools** for strategic succession planning.
- Support for end of year corporate processes.

Goals and OKRs

- **Create goals or OKRs** at organisation, department, team or individual level, giving organisational level visibility.
- **Roll-up goals** to auto-calculate top level metrics.
- **Goal/OKR dashboards** provide visibility for senior execs.



Success plans.

To help your organisation implement Perform365 and experience the full value of the product, we offer three plans that include different levels of support and service.



Success Basic

Access our on-demand tutorials and guides and receive guidance in a number of live sessions.



Success Plus

Everything from Basic, plus guided installation, a selection of add-on solutions, and more live sessions.



Success Premium

Everything from Plus as well as more live sessions and access to additional services.

The **Basic** success plan is included in all subscription plans

More details on all our success plans here:
<https://zensai.com/success-plans/>

Success plans.

	Basic	Plus	Premium
Installation and setup			
Assisted installation of platform services into Microsoft 365 tenant	-	✓	✓
Platform setup and core configuration	-	✓	✓
Platform Launch – Go Live Services			
Project Plan	-	✓	✓
Live Consulting Session	-	Up to 2	Up to 4
Live Customer Success Session	Up to 1	Up to 3	Up to 6
Platform Academy Quick Start Courses	✓	✓	✓

Lifecycle Services

Business review session		✓	✓
Live customer success session	Up to 2	Up to 4	Up to 8
Live consulting session		Up to 4	Up to 6
Dedicated Microsoft Teams channel			✓
Additional hours			Up to 16 h
Online academy access for Learn365, Perform365, Engage365	Limited	✓	✓
Online academy self-service user admin		Limited	✓
Customer community	Limited	✓	✓
Maximum support response time	Up to 16h	Up to 10h	Up to 6h

Find more details on the success plans here: [Pick your supportive Success Plan for the Human Success Platform \(zensai.com\)](https://zensai.com)

* Add-on solutions for Perform365 are not subject to the Zensai SaaS terms

Onboarding and Service Management.

Engage365 and Perform365



Installation

Workshop

Engage365 & Perform365 deployment

Roll-out plan



Look & Feel

Branding

Customisations



Training

Admin

Course & User Management



Templates

Check-in's

Annual Reviews



Goals & OKRs

Introduction

Goals & OKRs



Customer Success

Quarterly User Group Sessions

Bi-Monthly check-in with customer success team

Support & Customer Care from Essential

- Customers have access to our **UK based Support team** for phone, email, and remote support.
- Essential provides a technical support and customer success service to help our customers get the most from Perform365. This includes unlimited access to technical support and access to the latest versions of Perform365 software, as well as proactive sessions with specialists throughout the subscription period.
- Essential customers also benefit from our **quarterly user group sessions**, and periodic education sessions throughout the year. These are free and available to customers on all success plans.
- Support response times for **all Essential customers** are within 1 hour between 9-5pm UK Office hours, Monday-Friday (excluding bank holidays).
- In addition, Essential customers have access to the vendor support service, the response times depend on your choice of success package. Response times for normal severity are
 - Basic: 16 business hours
 - Plus: 10 business hours
 - Premium: 6 business hours
- Further information can be found in the SaaS agreement: <https://zensai.com/saas-terms/>

Example Projects:
Delivered by Essential and Zensai
To UK Public Sector organisations



Historic England

