



Work planned. Progress clear.

A connected workspace for project planning, task delivery, goals and performance review.

PROJECT PLANNING

DELIVERY VISIBILITY

PERFORMANCE REVIEWS



NeoPlan

WORK & PERFORMANCE PLANNING



NEODRICS
TECHNOLOGIES

A connected work and performance planning workspace for teams, managers and HR.

Plan the work. Follow through with context.

NeoPlan combines daily work management and delivery visibility with a structured quarterly performance review process.



Project planning

Projects, tasks, subtasks, owners and milestones.



Work views

Boards, tables, timelines, calendars and saved filters.



Delivery analytics

Output, timing, quality signals and capacity outlook.



Weighted goals

Library and custom goals that reflect priorities.



Self-assessment

Employee ratings, evidence and review windows.



Manager review

Ratings together, with feedback and gap flags.



Final ratings

Policy-guided normalization and publishing.



Audit & updates

Audit history, notifications and report exports.

5

CONNECTED REVIEW
STAGES

4

CORE REVIEW ROLES

1-5

GOAL RATING SCALE

CSV

HR REPORT EXPORTS

One connected conversation

Projects and task history describe the work. Goals, review evidence and feedback help teams discuss performance in the broader context.

Ownership, dates and progress in one place.

The planning workspace supports the people responsible for delivering work and the managers helping them coordinate it.

Capability	Included behaviour
Projects	Membership, searchable project lists, progress, labels and milestones.
Tasks	Tasks and subtasks, owners, priorities, types, points, dates and comments.
Work views	Boards, tables, timelines, calendars and personal work views.
Work organisation	Saved filters, inline editing and bulk updates.
Delivery reporting	Quarterly output, on-time delivery, schedule variance, task mix and completion.
Capacity outlook	Historical delivery estimates compared with open commitments.

Measured work is part of the picture

Delivery analytics use task-board data. Contributions outside the board remain part of the review conversation; capacity figures are planning estimates.

Role-scoped reporting

Employees see personal delivery, managers see their authorised team or organisation scope, and authorised reviewers can export team reports.

Evidence in. Traceable decisions out.

Quarterly reviews follow Draft, Self Review, Manager Review, Normalization and Published stages.

Capability	Included behaviour
Goal management	Goal library, custom goals, categories and relative weights.
Self-assessment	Goal-level 1–5 ratings, comments, autosave and review windows.
Manager review	Side-by-side inputs, feedback, discrepancy flags and weighted score.
Normalization	Distribution views, target suggestions, configured caps and audited adjustments.
Publication	Controlled release of final ratings to employees.
Visibility	Role-specific status, pending reviews and published rating history.
Administration	In-app events, configured email reminders, audit history and CSV exports.

Human review remains central

Rules guide the workflow and rating distribution. Reviewers provide the feedback, consider the context and make the final decisions.

A practical foundation for the way your team works.

Identity, project membership and review roles are configured for the organisation, alongside the quarter calendar and notification services.

IDENTITY

Microsoft / Azure AD

SSO requires organisation app registration, tenant and credentials. Local login is available for setup.

ACCESS

Roles & membership

Project membership controls work access. Review data follows employee, direct-report and organisation scope.

OPERATIONS

Quarter control

Administrators configure cycle dates and review windows. Scheduled jobs support locking and reminders.

RECORD KEEPING

Audit & reports

Workflow and normalization history support review traceability. HR can inspect and export records.

Rollout conversation

People	Confirm roles, reporting lines and project membership.
Work	Agree projects, task conventions, owners and milestones.
Review	Define goals, quarter windows and rating policy.
Services	Configure identity, email delivery and scheduled jobs.
Pilot	Walk through planning, delivery and review with a representative team.



NeoPlan

WORK & PERFORMANCE PLANNING

YOUR NEXT TEAM PLAN

Give every plan a clear next step.

Bring your projects, goals and review calendar.

We will walk through how NeoPlan supports your process.

01 / ALIGN

Map the process

Confirm projects, team roles, milestones, goal categories and quarter windows.

02 / REVIEW

Walk through the workspace

Explore work views, delivery analytics, goals, reviews and publication.

Start with a product walkthrough

Discuss your Microsoft identity setup, notification configuration and reporting needs with Neodrics.

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