

# Enhancements to the Annual Performance Bonus (PB) and Salary Increment (SI) Excel Templates

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## INTRODUCTION / BACKGROUND

The annual PB and SI exercise will require institutions to provide a set of data to the Compensation & Benefits (C&B) team. The data would then be used for the simulation of SI and to facilitate negotiation meetings with the Union. The Union would have requested for information for negotiation purposes and the C&B team will have to further request from institutions for more data which resulted in longer lead time and delays. Additionally, the C&B team will have to review, analyse the provided data, simulate SI matrices and prepare presentations for the entire PB and SI exercise.



### FOR INSTITUTIONS

Reduce the time and effort required to prepare and provide data for the annual PB and SI exercise.

### PROJECT AIMS

### FOR C&B TEAM

Reduce the time and effort required to prepare and complete the annual PB and SI exercise.



## METHODOLOGY

### 1 Review Past Work

What data is required for the PB and SI exercise?

- Studied the data required to be collated from institutions
- Reviewed past data analysis required for PB/SI simulations
- Past presentation slides and graphs required

### 2 Collation of Requirements

Based on past work review, we reviewed what the enhanced templates should be able to do.

### 3 Build Excel Templates

Based on collated requirements, enhancements were made to past data collation template and a new simulation template was created.

### 4 Gathering of Feedback

A briefing was organized for institutions' representatives. The C&B team demonstrated the features of the template. Institutions' representatives Q&A + Feedback gathering

### 5 Revision of Templates

Based on institutions' feedback, further enhancements were made to the templates

### 6 Template Roll Out

## RESULTS

### 2 excel templates were created

#### Data Collation Excel Template

Created to assist institutions' HR colleagues in providing the comprehensive staff information required for the PB and SI exercise.

- ✓ Formulas were provided for institutions to easily categorize the raw data generated from the HRIS system and filtered for data input into the template.
- ✓ Simple data analysis was provided on the breakdown of their staff performance and corresponding cost impact

#### Simulation Excel Template

Created to enable the C&B team in providing real time simulation results during Group HR Meetings.

- ✓ Facilitated a more productive discussion during the meeting and shortened the time required to reach an agreement on the matrices among the HR Heads.

With a combination of both templates, the team formulated Excel presets for simple data analytics and graphs:

- ✓ Improved efficiency – shortened time required to review / analyse data
- ✓ Shortened time required to prepare presentations for the entire PB/SI exercise.

## CONCLUSION

With the templates, the process taken to prepare and complete the annual PB and SI exercise was improved. There was increased efficiency and effectiveness:

- ✓ Reduced the frequency of data clarifications with institutions by around 20%
- ✓ Shorten the time required for institution to prepare the data
- ✓ Improved quality and efficiency of simulations
- ✓ Reduced effort in preparing for presentation decks
- ✓ Allow productive discussions during meetings