



## LD MANAGEMENT BECOMES ECO-FRIENDLY AND EFFICIENT WITH SAGE ABRA AND PERFORMANCE APPRAISAL MANAGEMENT (PAM)

**CUSTOMER:**  
LD Management, Inc.

**COMPANY PROFILE:**

Industry: Retail Stores

Locations: 38

Employees: 300

Users on  
Sage Abra HRMS: 50

Users on Performance  
Appraisal Management: 100

When LD Management opened its first store in Columbus, Ohio, 35 years ago, paper records were an unavoidable feature of the human resources department. Since then, the company has expanded to 38 retail locations and 300 employees. Well known in the industry, the company prides itself on having neat, clean stores and professional customer service. Those attributes not only contributed to the company's sales growth, but to the growth of its paper records, too. When Human Resource Manager Gay Hicks found herself dealing with 300 square feet of filing cabinets containing employee records, she knew her department must lead the company into a more technical era of orderliness. It was time to streamline paperwork and processes associated with the employee performance appraisals.

While LD Management was already using Sage Abra human resources software, they were ready to take it to the next level. The nature of LD's business model – 38 stores and a central corporate headquarters – demanded robust, intuitive software. "In 2008, my department decided to go "green" by transitioning to a paperless system. We needed Performance Management software that was compatible with Abra. It had to be flexible enough to allow a store supervisor to open an application on an employee, yet comprehensive enough to effectively manage executive level staff at the corporate level," Gay notes.

### MEETING DUAL DEMANDS

Gay's research led her to Perryman's Performance Appraisal Management (PAM) software. PAM was also recommended by her Abra Business

Partner who maintains LD's Abra database. "We chose PAM because it was specifically written for Abra. That was key," Gay says.

Once the company made their decision, Gay and her staff began developing the PAM system. "We created templates within PAM so that all store employees – retail and management – are evaluated using criteria directly related to their individual job descriptions. We created customized templates for each corporate position as well." Working from LD Management's Ohio headquarters, Gay electronically sent the newly created electronic appraisals to store managers around the country so that they could complete appraisals on each associate.

### CHALLENGE

Transition to a paperless human resources department. This required performance appraisal software flexible enough to be used by managers at 38 store locations and comprehensive enough to include employee self-evaluations. The system also had to work in concert with corporate human resources.

### SOLUTION

Use current Sage Abra HRMS in concert with Performance Appraisal Management (PAM) module customized to LD Management's specific HR needs.

### RESULTS

Employees are more involved in the performance appraisal process and this should contribute to better retention rates. Computerizing the process allows the company to be more environmentally friendly and will free up 300 square feet of space currently occupied by filing cabinets.



Development Partner



“Sage Abra and PAM are compatible with any business because you can create customized evaluation criteria. It’s not a canned system, it’s very open-ended. The possibilities are endless.”

Gay Hicks  
HR Manager, LD Management



Development Partner

During the transition, Gay relied on Perryman’s technical support staff for assistance. “They were very responsive. They could log onto my computer and walk me through the process by phone. They were customer-oriented and made sure my needs were being met.”

### USER FRIENDLY APPRAISALS

At this point, about 100 employees, including store managers and corporate employees, interface with PAM. Eventually, all employees will be active users. When employees receive appraisal forms, they will be asked to evaluate their performance based on their job descriptions. Additionally, they will be required to develop goals and identify training needs. Managers will complete an identical process on each employee.

When there are discrepancies between employee and manager appraisals, PAM identifies them through a weighted scoring system. Gay believes this promotes communication and creates opportunities for positive interaction between manager and employee. “Each person gains a true interpretation of what the other feels. That’s very advantageous.”

Gay appreciates the ability to monitor a manager’s progress. “At any time, PAM allows me to see where a manager is in the appraisal process. If necessary, I can intervene. For example, I might suggest that they establish more clearly defined goals,” Gay says, adding, “Or, if a manager isn’t very computer literate, I can train them in the process without leaving my office.”

According to Gay, PAM’s performance appraisal process, “helps to identify gaps in performance communication, creates talking points for managers and employees and helps track measurable, attainable goals.”

Since LD Management conducts performance reviews biannually, PAM is simplifying Gay’s job in other ways, too. “I don’t have to recreate the wheel each time. The previous goals, reviews and training are in one place. I can pull them up any time, right on my desktop.” PAM will streamline future HR tasks, too. Since performance reviews become a permanent employee record, PAM provides an overall performance picture.

### REAPING THE REWARDS

Now that setup is complete, Gay is reaping the benefits. “The managers really like the fact that employees can do self-evaluations. PAM will encourage our employees to be more involved in the process and in their growth. That should improve retention, which contributes to company growth,” she says, adding, “Abra and PAM are compatible with any company because you can customize the evaluation criteria. Comments can be added, and you can request customized reports. It’s not a canned system, it’s very open-ended. The possibilities are endless.”

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