

How the 40-Year Business Advisory Firm Replaced Legacy Systems with a **More Intuitive** Solution.

How Primalogik Gave Sensiba San Filippo the Gift of Smarter Information.



THE INDUSTRY
**Business Advisory
/ Accounting**

HEADQUARTERS
Pleasanton, CA

YEAR ESTABLISHED
1977

COMPANY SIZE
150-200

"One of the reasons we love using Primalogik is their willingness to listen to our needs and push their product forward."

- Alex Chan, Director of Learning and Development

The Problem

Sensiba San Filippo is an accounting and business advisory firm that's been around for 40 years. When Alex Chan started working there two years ago, he sought to find additional efficiencies. "We typically did company-wide appraisal, and I put my hand up and told the managing partners that the process that we had could be improved upon. We were doing multiple performance evaluations a year, which included a 360° review, a self review, a calibration meeting with management, then a manager evaluation, and then a final sign off," explains Chan.

"Each manager took on average, 4 hours to perform the evaluation part, which included real-life meetings. Plus the final results were inconsistent year-over-year, and we couldn't compare from peer-to-peer."

The Solution

"I was familiar with the Primalogik name, and I wanted to prove that this concept would work for the organization, so I decided to migrate our performance management capabilities to Primalogik. We just used the 360° Feedback Surveys for the first review cycle to ease people into the system, but once we started getting comfortable with it everyone became enthusiastic about putting forward good information," explained Chan. "and because I was able to make adjustments to scoring, I had information from year-to-year that I could compare for both the individual and the group."

The Primalogik Advantage

"The time required for each review went from 4-8 hours to about 1 hour," exclaims Chan. "We also added the Goals and Instant Feedback modules, so everyone in the organization knows that Primalogik is synonymous with performance appraisal."

Modules Used

- Instant Feedback
- 360° Feedback Surveys
- Performance Appraisals
- Goals