

## COMPUTER SYSTEM FOR MONITORING ACTUAL PERFORMANCE TO STANDARDS IN REAL TIME

### FIELD OF THE INVENTION

[0001] The present invention relates generally to the coordination of management activities, and more particularly, to a handheld computer system for facilitating evaluation and training of a plurality of employees.

### BACKGROUND OF THE INVENTION

[0002] The success of a business often hinges on its ability to create and maintain a highly efficient workforce. To meet this need, a company must invest the time and effort needed to properly train its employees, and evaluate their performance. On-the-Job training and Supervision (OJS) is one of the primary means by which many companies seek to achieve this objective. OJS can include any type of training or evaluation activities that seek to improve the effectiveness of a company's workforce. Although, in practice, "training" activities and "evaluation" activities may overlap, training refers generally to instructing an employee on the proper way of doing something, and "evaluation" refers generally to the process of observing and recording the manner in which an employee performs his or her job.

[0003] A management session between a supervisor and a subordinate typically comprises evaluating and/or training the subordinate in a particular job-related area, such as production, safety, service or sales. Traditionally, a supervisor conducts a management session using a clipboard with one or more printed sheets of paper, and a timing device if timing data needs to be collected. The printed sheets of paper are typically forms that provide the supervisor with guidelines and background information pertaining to the current management session. The sheets also provide the supervisor with a medium on which to record information regarding events that occur during the session. After a management session, the printed sheets of paper can be filed away for later reference and analysis.

[0004] One problem with the traditional method is that it makes analyzing and sharing information across an organization cumbersome. Another problem with this method is that it generates a large amount of paper work that needs to be organized, and processed. This is especially problematic in the case of large corporations, which can have thousands of employees. To address these types of problems, some prior systems now use computer data collection. For example, International Patent Application No. PCT/US96/02481 to Kadaba discloses a system that uses a hand-held, portable computer for coordinating maintenance, or other activities, for a plurality of motor vehicles, which includes the capability to track the amount of time it takes an employee to complete each of the tasks he or she performs in a day. However, these types of systems have still not addressed a number of other problems related to the training and evaluation of employees, some of which are described below.

[0005] Another problem with existing methods is that they are time consuming. Typically, to ensure that management sessions are effective a supervisor must conduct separate sessions for different types of training or evaluation. Therefore, a session is usually designed to focus on a particular

job-related area of training and evaluation, such as production, safety, service or sales. Since this results in more management sessions per employee, the above approach is both costly and inefficient. The problem can be further compounded by the fact that some organizations, such as package delivery companies, are required to perform many of these individual evaluation and training sessions out in the field with employees who are moving from place to place.

[0006] Yet another problem with existing methods is that they do not provide a way of compensating for the training and evaluation discrepancies that can occur as a result of different supervisors possessing different levels of knowledge and experience. The more numerous and sophisticated training and evaluation methods become within an organization, the more likely it is that some supervisors will be less knowledgeable and/or less experienced than other supervisors. Such discrepancies across different supervisors can lead to inconsistent training and evaluation of employees.

[0007] Therefore, a need exists in the art for a system for, and method of, efficiently and effectively training and evaluating employees. The method and system should minimize paper, facilitate the ability to analyze and share information across an organization, provide an efficient way to train and evaluate employees in a number of different job-related areas including those who move from location to location during the work day, and mitigate discrepancies that occur as a result of supervisors possessing different levels of knowledge and experience.

### BRIEF SUMMARY OF THE INVENTION

[0008] The present invention seeks to provide a system and method for efficiently and effectively training and evaluating employees, which minimizes paper, facilitates the ability to analyze and share information across an organization, provides an efficient way to train and evaluate employees in a number of different job-related areas including those who move from location to location during the work day, and which mitigates discrepancies that occur as a result of supervisors possessing different levels of knowledge and experience.

[0009] In accordance with the present invention, this object is accomplished in a handheld personal computer that is programmed with multiple supervisory functions, which are displayed in an integrated format to reduce the number of supervisory sessions required for a given employee. The system also provides for the capture and storage of automatic work measurement data, as well as health and safety data, which can be integrated with yet other data captured by one or more sensing devices within the employee's workspace.

[0010] One embodiment of the present invention is a computer for facilitating management activities relating to a subordinate's work, which comprises a memory for storing data relating to a plurality of management activities, a display, an interface for inputting information, and a processor, configured to initiate a management session relating to the subordinate. Furthermore, within a management session, the processor is configured to display a first set of stored data relating to a first management activity, receive and store a first set of input data relating to the first management activity, display a second set of stored data