



# CLIENT CASE STUDY

## Transforming performance with Covalent at West Yorkshire Passenger Transport Executive



The West Yorkshire Passenger Transport Executive (WYPTE) and the West Yorkshire Passenger Transport Authority (PTA) and Executive (PTE) form 'Metro', a professional body coordinating public transport services across the region. Working on behalf of the 2.1 million people of West Yorkshire, the Executive employs over 400 people to carry out the work required by its policies. WYPTE chose Covalent in March 2008 as their preferred CPM software solution. After a tailored training programme and departmental pilot, and with top-level support for the performance initiative, Covalent was rolled out across the Executive.

### Choosing Covalent to manage performance

'Before implementing Covalent at WYPTE we had a basic in-house system to manage corporate performance data. We used this system mainly for project management and monitored progress against actions by department. Creating regular management reports was a labour-intensive process without a quick solution. As our ambitions for performance management within the organisation grew, we found that we needed a more sophisticated system to match. We chose Covalent because it provided a way of easily storing and monitoring data, and enabled us to produce useful and visually appealing performance reports. We were, and remain, highly impressed with Covalent's one-click reports generation functionality.'

Catherine Cox, Corporate Projects Officer, WYPTE

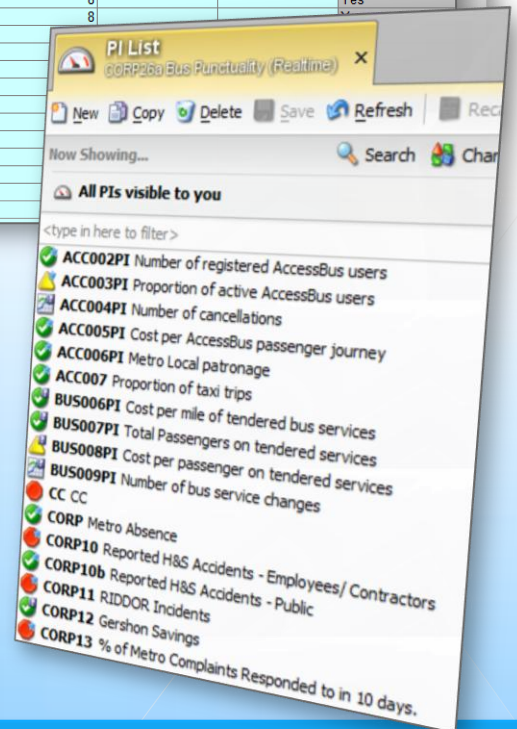
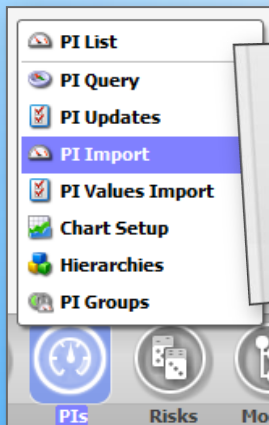
### Departmental piloting and data loading

'Initially, we piloted Covalent within three departments for three months. As Corporate Projects Officer, I was tasked with importing all of the organisation's performance data onto Covalent, beginning with corporate indicators. I imported the information using Covalent's import spreadsheets on a department-by-department basis, rather than all at once. This made implementation far more manageable and allowed teams to carry out all-important data cleansing exercises to ensure that only relevant information was added to Covalent.'

Catherine Cox, Corporate Projects Officer

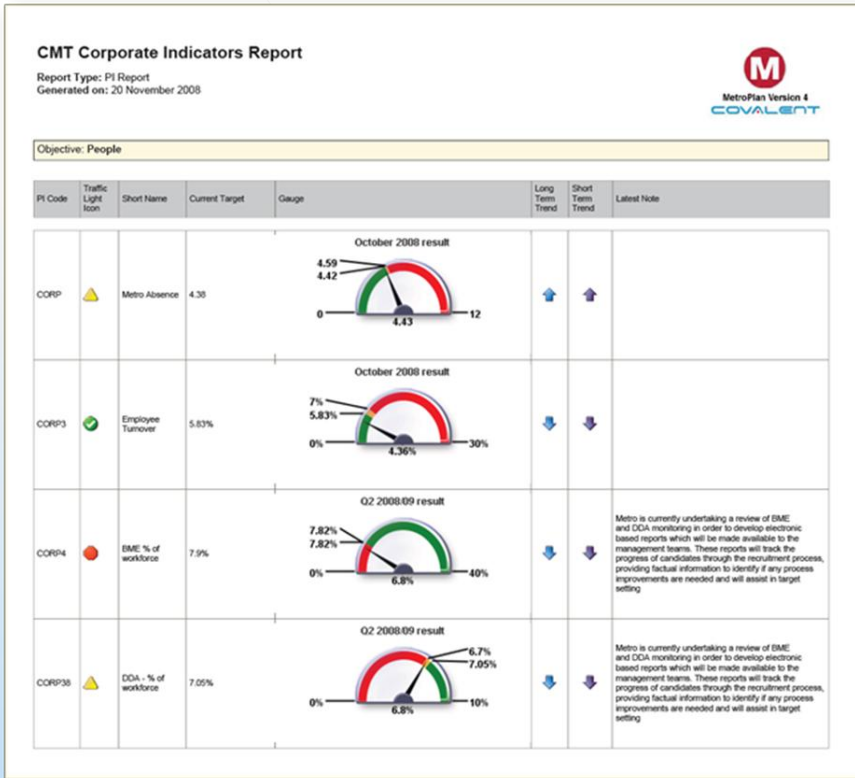
Top right: Covalent's imports spreadsheet (sample data).  
Left: PIs topic button and menu.  
Centre: PI gauge.  
Right: PI List showing RAG status.

	A	B	C	D	E	F	G	H
	PI Code	Year	Period	Value	Target	Pre-audited	Forecast	Activated?
2	PI001	2005/06	YEAR	100	100			Yes
3	PI001	2006/07	YEAR	96	100			Yes
4	PI001	2006/07	QTR1	24	25			Yes
5	PI001	2006/07	QTR2	24	25			Yes
6	PI001	2006/07	QTR3	24	25			Yes
7	PI001	2006/07	QTR4	24	25			Yes
8	PI002	2006/07	APRIL	8	8			Yes
9	PI002	2006/07	MAY	8	8			Yes
10	PI002	2006/07	JUNE	8	8			Yes
11	PI002	2006/07	JULY	8	8			Yes
12	PI002	2006/07	AUGUST	8	8			Yes
13	PI002	2006/07	SEPTEMBER	8	8			Yes
14	PI002	2006/07	OCTOBER	8	8			Yes
15	PI002	2006/07	NOVEMBER	8	8			Yes
16	PI002	2006/07	DECEMBER	8	8			Yes
17	PI002	2006/07	JANUARY	8	8			Yes
18	PI002	2006/07	FEBRUARY	8	8			Yes
19	PI002	2006/07	MARCH	8	8			Yes
20	PI002	2007/08	APRIL	9	9			Yes
21	PI002	2007/08	MAY	10	10			Yes
22	PI002	2007/08	JUNE	15	15			Yes
23	PI002	2007/08	JULY	12	12			Yes
24								
25								



**CLIENT CASE STUDY**

**Integrated corporate reporting achieved high-level Covalent backing**



*'Departmental PIs were reported to our corporate team each month, which was a great way to get high-level backing once they saw the benefits that Covalent could bring. In fact, our directors very much pushed a "Covalent culture" from the outset. This directorate support, along with the fact that staff were used to a performance management culture, meant that Covalent was embedded very quickly at WYPTE.'*

**Catherine Cox, Corporate Projects Officer**

Above: CMT Corporate Indicators Report.  
Below: Covalent training workbooks.

**Tailored user training**

*'Managers were very supportive of Covalent, which allowed us to implement the system quickly. User training was tailored to the individual needs of each department, as we knew that each team would use the software slightly differently to achieve their own objectives. We found this approach to be very successful.'*

**Catherine Cox, Corporate Projects Officer**



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## Managing team objectives with Scorecards

'We are now using Covalent across the organisation, with each team managing their annual plan and various projects via actions and PIs.

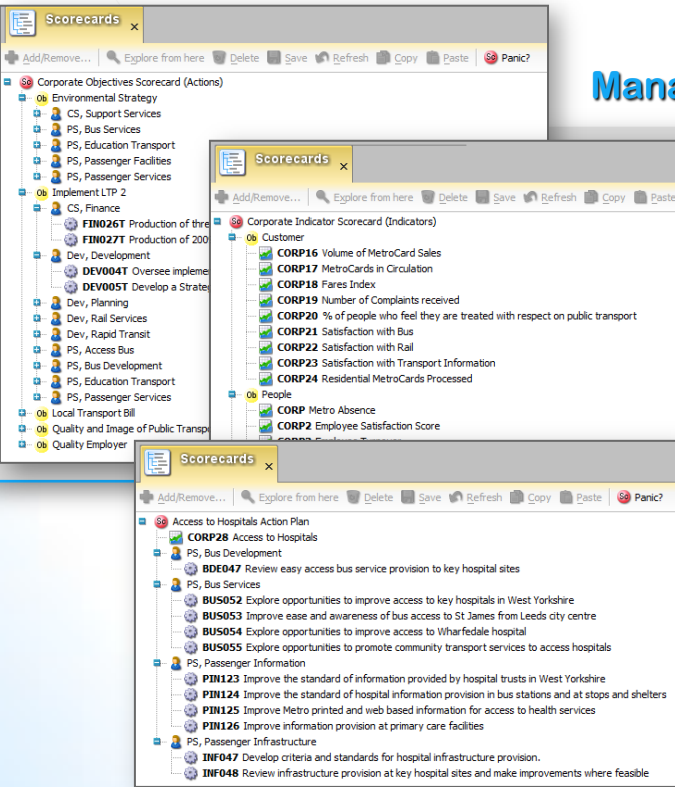
'Managers find Scorecards invaluable for understanding team strategies and priorities. They use Scorecards to view overall RAG status and to drill down to assess the PIs and actions which contribute to meeting team objectives.'

**Catherine Cox, Corporate Projects Officer**

Top left: Corporate Objectives Scorecard.

Left: Corporate Indicator Scorecard.

Below left: Access to Hospitals Action Plan scorecard.



## Monitoring risks registers

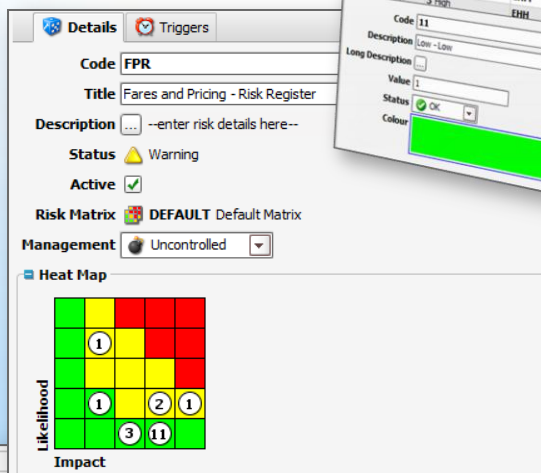
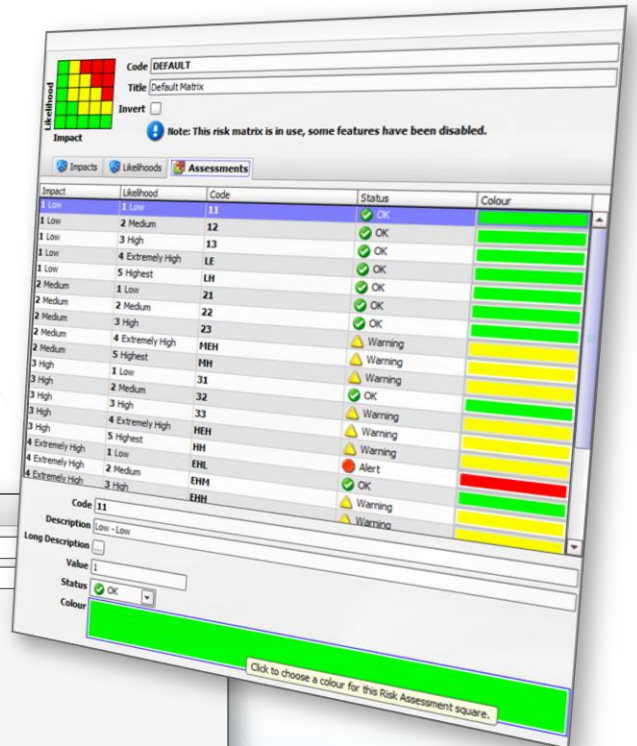
'We also use Covalent to monitor WYPTE's risk register, which is reviewed on a bi-monthly basis. The ability to compare original, current, and target risk status is proving very useful, as is customising risk matrices to best reflect the likelihood and impact of our corporate risks. In fact, we are currently developing a major joint project with Leeds City Council and are using Covalent to manage the project's emerging risk register.'

**Catherine Cox, Corporate Projects Officer**

Top right: A matrices setup screen used for customising risk matrices.

Right: Details view of a parent risk, with heat map showing the status of sub-risks.

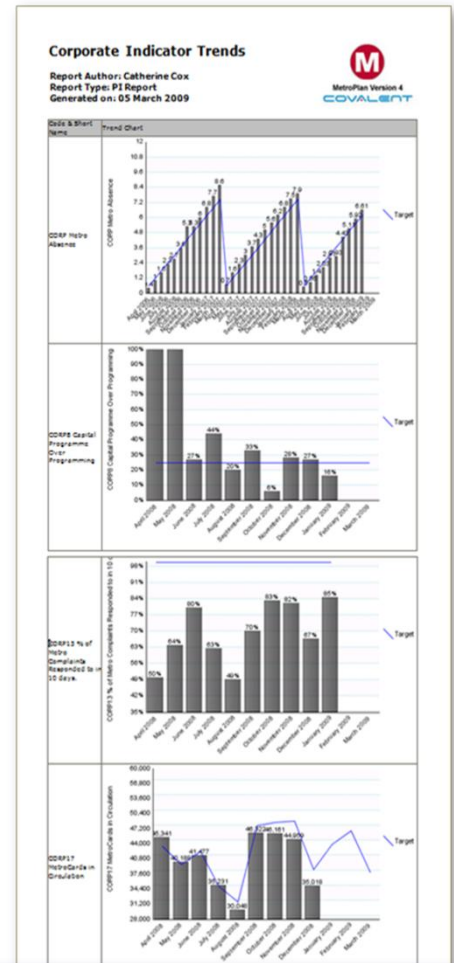
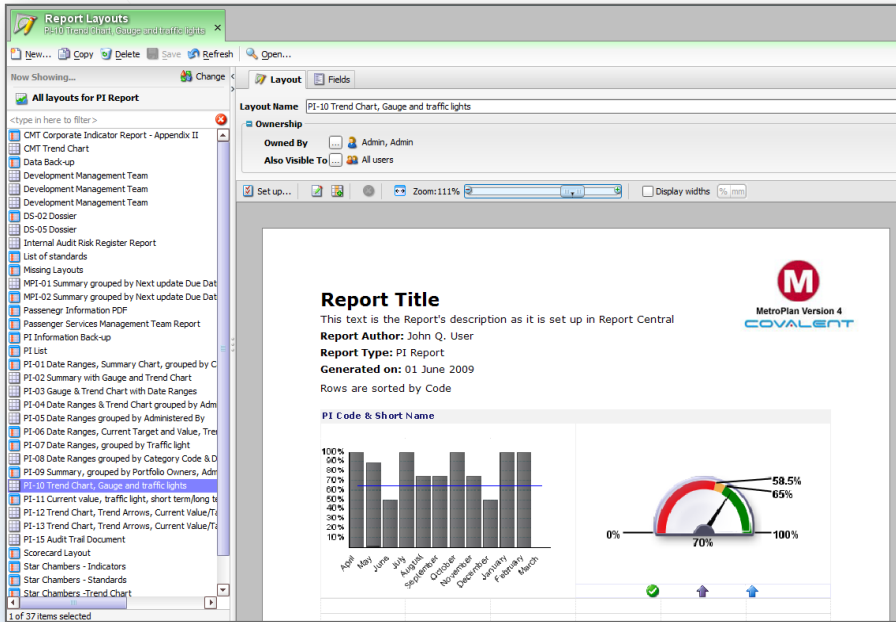
Below: Overview of sub-risks.



Risk	Status	Current Impact	Current Likelihood
FRP001 Loss of knowledge – payments	OK	4 Extremely High	1 Low
FRP002 Loss of knowledge – income	OK	4 Extremely High	1 Low
FRP003 System failure – Excel	OK	4 Extremely High	1 Low
FRP004 System failure – BACS	OK	4 Extremely High	1 Low
FRP005 System failure – Bleep	Warning	4 Extremely High	2 Medium



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## Meetings managed with the help of integrated reporting

'At present I create and generate all reports from the system. Covalent reports are used in most meetings, such as corporate management meetings, annual project reviews, and risk management meetings, the latter focusing on red status and priority 1 risks in need of urgent action. Some management teams have "electronic meetings" and Covalent is used live within these sessions as it provides an up-to-the-minute view of performance and can be updated then and there, which managers find extremely useful.'

**Catherine Cox, Corporate Projects Officer**

Top left: Covalent's Reports Layout Editor.  
Top right: Corporate Indicator Trends report.  
Right: Exception reporting with Priority 1 and Red Risks report.

## Plans for the future

'We plan to use Covalent even more extensively in the future. All users can now view reports, but our next step is to train users to design and generate their own reports, rather than doing so centrally. We would also like to purchase the Strategy Maps module to provide customised one-page overviews of our corporate performance, which we feel will be of great benefit for macro managing and improvement planning across the organisation.'

**Catherine Cox, Corporate Projects Officer**

## The business benefits

'Covalent has proved to be an effective tool in managing performance at WYPT. From the start we found the system easy to use without compromising on functionality, a combination that has helped us to transform the quality of our data outputs. I would definitely recommend Covalent to organisations looking to improve their corporate performance.'

**Catherine Cox, Corporate Projects Officer**