

The six generic roll-out models for Covalent Performance Management Software

When introducing a Performance Management system to your organization one of the more critical decisions you will need to make is the approach you take to introducing users, across the various departments and service areas, to Covalent. Ultimately the clear goal of any implementation is to have a large pool of users who are both comfortable using Covalent and enthusiastic about the benefits it will bring them. It is therefore a combination of training/ education and selling the concept; getting buy-in to using Covalent is a pre-requisite for a successful implementation.

Another end goal should be to have the Covalent administration load distributed widely so that there are many different users updating the information across the organization.

In reviewing the many different approaches that we have been involved with in over 100 Covalent implementations, we have identified 6 generic models that have all worked successfully as detailed on the following pages. The most appropriate model for you will depend on a combination of factors:

- Whether users are already familiar with the concepts and the broad functionality because they have been using another system for some time, either internally developed or from a competing supplier.
- Related to this will be the organizational culture, and whether there is already well established Performance Management processes or if they are just now being introduced.
- The need for speed. If there is a major driver to get people up and running with Covalent asap then some of the approaches which take a more incremental approach will be less suitable.
- Whether there is a fair degree of clarity how the system will be used and how people will interact with it
- Any limitations associated with limited licence numbers



Model 1 – “Big bang” Corporate-wide

The ‘big bang’ model means widespread roll-out in most/all departments in one go, and training of all users on the system immediately from Senior Management team through to data inputters.

PROS	CONS
<ul style="list-style-type: none">• Minimises timescales for full use & uptake of system• Maximizes data available for view at a strategic and operational level.• Ensures clear message to users that this is how we all now work.• No need to maintain 2 or more different systems and methods of information collection.	<ul style="list-style-type: none">• Will require the greatest Site Admin resource as everyone will have the same questions at the same time.• Any problems with coding or structure or access levels may be more difficult to resolve because of the numbers involved.

Tips for success

- Requires clear project plan and communication of rules for system use
- Focus a lot of effort up front getting the site configured properly so that it is as complete (and impressive!) when you launch it to users
- Train a small group of users up as ‘system champions’ or super-users’
- Build up to a “launch” date, ideally with some hype around it, to create interest and momentum for the project
- Run a series of follow-on events to ensure the launch momentum is not lost
- Showcase successful usage of Covalent early and often

Model 2 – Site Admins and Super Users only

This model is similar to the ‘big bang’ model, with the major difference being the depth to which each department or service area embraces Covalent. With the big bang, there are multiple users in each department using Covalent, to update data and configure the system to suit their own personal and team needs. The SASU model instead adopts a core group of users or product champions (just one or two from each department – giving them responsibility for their own area of data and reporting). They take on the role of both mentors and system evangelists.

PROS	CONS
<ul style="list-style-type: none">• Gets a good level of key up to date strategic and operational data into the system and provides a proof of benefit to other users. Gives later users an experienced and hopefully enthusiastic point of contact for help, advice and encouragement.	<ul style="list-style-type: none">• May hinder a greater adoption of system use as a management tool if users defer responsibility to the ‘experts’.

Tips for success

- Choose these users well if they are to be your key system and process advocates.
- Ensure that outputs are consistently used by senior management from the earliest opportunity to effect decision making.



Model 3 – Departmental Pilot

A popular approach is to pilot the use of Covalent in one department, then progressively roll-out to others. This department might be the one most likely to succeed and therefore provides a quick-win illustrating what can be accomplished with Covalent. Or it might be the most sceptical department and winning them over will then encourage others along the lines of “if it’s good enough for them, then it must be ok”.

PROS	CONS
<ul style="list-style-type: none">• This option will help to iron out any set-up and procedural questions prior to broader roll-out preventing any possible false starts. Can provide clear proof of benefit and develop expertise that can be used to support the roll out process.	<ul style="list-style-type: none">• Piecemeal approach with potential for resistance from later adopters.

Tips for success

- This works best where the department is a willing volunteer who is well supported in making it work.
- Have a clear plan for moving from the pilot to the full roll-out phase.

Model 4 - Corporate centred

This model is one of the narrower approaches, with the corporate performance team undertaking all the work on the system and just providing view only access to users, with no/ limited data updating.

Users from across the organization continue to send data via spreadsheets to the corporate team, who then input the data themselves and possibly then provide departmental users with personalised reports and views. In other cases the departmental users don’t even access Covalent. This model is clearly popular with those who have limited numbers of Covalent software licence.

Often this may be the way customers start out and then move onto one of the other models

PROS	CONS
<ul style="list-style-type: none">• Minimises change within the organization, ensures consistent approach to data quality and structure.	<ul style="list-style-type: none">• Reduced level of individual responsibility & accountability. Limits use of system and opportunities to proactively manage performance at all levels of the organization.

Tips for success

- Set rigid deadlines for return of data and quality of notes.



Model 5 - Incremental

In essence this is a variant on models 1 & 2, whereby the software is rolled out to other departments but initially the usage that it is put to in those departments is fairly limited, often view only.

The idea is that over time, users are given more permissions and scope to view more information based on "pull" from users who want more features as they become more familiar with it.

PROS	CONS
<ul style="list-style-type: none">• Stronger buy-in will be created if users are asking for the system rather than having it imposed on them• Pace of adoption gives you time to adjust as you go• Training requirement is quite low	<ul style="list-style-type: none">• May take a long time to truly embed Covalent• You may not get the user "pull" you are looking for and instead it may be best having the process imposed• Needs more effort ongoing selling the system internally

Tips for success

- Beware the process stagnating with limited adoption or usage anywhere
- You need to showcase successes to encourage more users to ask for more access to the system

Model 6 - Module by module

The final model will involve some of the characteristics of the other 5 models, with the major difference being that there is a focus on just one Covalent module first (maybe PIs or Actions). As users become familiar with using Covalent and understanding the base concepts and working mechanisms, then other modules can be introduced. Clearly this model is popular where one of the Covalent module areas is the prime and overriding priority.

PROS	CONS
<ul style="list-style-type: none">• User buy-in more likely as they will be working with an area of direct relevance• Training requirement is quite low• Likely to lead to quick-wins which you can build on• Site admin load is lighter	<ul style="list-style-type: none">• Not really getting the full benefits from Covalent in having a fully integrated system• Likely to have limited impact on transforming corporate performance

Tips for success

- Ensure as complete a data load as possible so all users can see data of relevance to them