CROSS-MODULE IMPLEMENTATION GUIDE

BUILDING BLOCKS FOR A SUCCESSFUL CROSS-MODULE IMPLEMENTATION

EXECUTIVE SUMMARY

Before unified talent management solutions were available, organizations selected best of breed solutions to support recruiting, performance, learning and other talent processes. Systems were managed independently, sometimes with integrations but more often than not without any consistency or connectivity between them. With the emergence of unified talent management a new challenge has emerged; functional areas that once worked independently now need to collaborate and come to consensus on data and processes in order to fully maximize the technology investment.

A critical step for a successful cross-module deployment is the coordination of resources, requirements, and expectations around features that span multiple functional areas. Are the competencies assessed during the performance process tied to development items in your learning catalog? Do the teams that manage recruiting, performance, learning and other HR functions in your organization work together today? There are at least four main components needed to develop an effective cross-module coordination strategy: a clear governance framework, a cross-module communication strategy, a defined roll-out approach, and alignment on foundational elements.

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Establish Governance	**Drive Cross-Module Communication**	**Determine Your Roll-out Approach**	**Align on Foundational Elements**

PART 1

Establish Governance

ESTABLISH A GOVERNANCE FRAMEWORK

Establishing a governance structure is important for any system implementation, but the governance structure becomes even more crucial when an organization is diving into a cross-module implementation. Until recently, talent management professionals working in siloed departments was the norm. Performance professionals dealt with performance reviews, learning professionals dealt with content development, and so on with little collaboration taking place. As platforms are being implemented and connecting these HR functions, more governance is required to manage the interconnecting processes and systems used to administer them. As a result, creating a governance framework to help navigate all facets of talent management becomes important for organizations.

QUESTIONS TO CONSIDER

- Who are the players? Do they work together now?
- How will they work together in the new system?
- How much autonomy will the module teams have?
- Who has authority to make process changes?
- Who has authority to make configuration decisions?
- Will the same players be involved post-launch?

ADMINISTRATOR ROLES AND ACCESS

The roles and responsibilities given to Talent Administrators are shifting as organizations consider holistically how all the processes fit together in a cross-module implementation. For example, a setting change or action taken by a Performance Administrator may directly or indirectly impact the settings in another module. For this reason, an overall or core System Administrator is necessary to oversee and manage all the actions taken across all modules. The core System Administrator will be responsible for coordination between all of the administrators and ensuring that any change requests for a specific module are considered in light of impact across the system as a whole. Establishing the roles for these administrators early on is important to avoid running into any of these issues.

QUESTIONS TO CONSIDER

- Who will be responsible for overall system ownership/ management?
- Will module admins have access to module-specific configurations?
- What levels of admin access are needed?
- Who will have the ability to assign these roles/grant access?

SUPPORT MODEL

As organizations roll out unified talent management systems, the customer support solution must be structured to effectively support all modules across the system. It is important for organizations to invest the time to build a successful support model, taking into considerations different types of requests (module-specific, system access, etc.) to be sure each is routed appropriately. Procedures and resources should be in place prior to go-live, with multiple avenues of support for users.

QUESTIONS TO CONSIDER

- Can the existing support model work for the new system?
- To what extent can support be centralized?
- How and to whom will support tickets be routed?
- How will support instructions be communicated to users?
- What is the process to track tickets and assess possible change requests or training needs?

PART 2

Drive Cross-Module Communication

REGULAR MEETING CADENCE

To stay aligned on goals and expectations, a regular meeting cadence should be established with project stakeholders. To encourage strong attendance, meetings should be scheduled in advance and take into account varying participant time zones. Each meeting should have clearly defined objectives that are communicated to participants prior to the start of the meeting. Key stakeholders should be held accountable to attend meetings, and invitation lists should be closely managed to keep meetings small enough to be productive. There can be a tendency to over-invite to cross-module meetings, which typically results in reduced efficiency and increased distractions.

QUESTIONS TO CONSIDER

- Who should be invited from each module team, i.e., Learning, Performance, etc.?
- How often should you meet? Weekly? Bi-weekly?
- What are the objectives for each meeting?
- Who is responsible for scheduling and leading each meeting?

TARGETED CROSS-MODULE TOPIC WORKSHOPS

In cross-module implementations, organizations need to make decisions around the configuration and use of functionality with impact across multiple modules (e.g., organizational structure, welcome page layout and elements, portal navigation, competencies, etc.). The complexity of these conversations may be best managed through focused, in-person workshops rather than multiple short meetings via phone or an online meeting tool. To make these workshops successful, it is essential to have active participation by key decision makers, as well as system experts who can help the stakeholders understand how their requirements affect other groups and parts of the system. These workshops can also provide a vehicle to expand discussions beyond module requirements and their system impact to ways the organization can truly maximize the benefits of a unified talent management system.

QUESTIONS TO CONSIDER

- What cross-module topics are relevant for your implementation?
- What are the desired outcomes from the workshop?
- Which stakeholders should be invited to the workshop?

TOOLS TO MANAGE AND SHARE OUTCOMES

Important decisions will be made during cross-module meetings and workshops; therefore, creating an effective format to document these decisions and circulate feedback to the larger audience is imperative. Often there are stakeholders across the organization that may not be required participants for a meeting but who have a vested interest in its outcome. If the discussions and decisions from meetings across all implementation project workstreams are documented and made available to the full project team, stakeholders can review and provide feedback as needed.

Additionally, project managers should maintain and distribute weekly project status reports that clearly reflect the current and upcoming project activities, identified risks and concerns, and how the project is tracking to the agreed-upon timeline/project plan. Depending on the project management structure, it could make sense to have multiple reports for each module that are also combined into a single overall report. As a best practice, we recommend using a company-wide sharing platform to organize and store project documents in to provide ease of access across the project team.

QUESTIONS TO CONSIDER

- Who will be responsible for taking notes and documenting decisions during each meeting?
- Who will maintain the project reports? How often will they be updated? Are separate module reports needed?
- Where will the project document repository reside?
- Who will be responsible for building and maintaining the project document repository?
- What is the agreed-upon format for meeting notes, project status reports, etc.?
- How will the team distribute meeting notes and reports to the larger audience?
- How will post-meeting feedback be collected?

STRATEGIC VISION ACROSS ALL MODULES

To fully leverage the talent management suite and maximize the benefits and return your organization achieves through its implementation, it is essential to maintain a holistic view of the system. As previously siloed functions come together in a single system, new opportunities to harness collective data and streamline processes will be available. It can be easy to default to a "lift and shift" mentality during the implementation, but organizations that can look forward to the higher level possibilities and objectives will see a greater benefit from their transition to a unified talent management solution.

It is also important to note that even if an organization is not implementing a certain module in their talent management platform, there may still be cross-module factors to consider across systems. For example, even if an organization uses a different tool for performance management, employees may need to take training tied to competencies that are part of the performance process. Therefore, these competencies will need to be created in the system and tied to learning objects.

PART 3

Determine Your Roll-Out Approach

When implementing a talent management suite, organizations must determine how they will approach the implementation schedule across the various modules. It is important to assess which approach will best support your organization's short and long term objectives based on several factors.

PHASED BY MODULE OR BIG BANG

When planning a cross-module implementation, the team must determine whether modules will be rolled out in a phased, sequenced approach or all at once ("big bang"). Some organizations find the best solution is to start by implementing a single module, capitalizing on the lessons learned and user feedback received before moving to implement the next module(s). Others seek to leverage the synergistic capabilities of a unified talent management system when the system is initially introduced. The correct approach will depend on your own organization's objectives, timeline and resource considerations.

From a resource perspective, if you start with a single module you will still need to think about the availability of resources across the organization. For example, if you start with learning and there is a desire to link competencies to learning items, you may need the involvement of recruiting resources if competencies are also linked to job descriptions, and performance resources to ensure that the competencies are aligned to those used in competency assessments. You will need to set the expectation that even if it a module is not in an individual's primary area, some time will need to be allocated to participate in discussions that will affect their own deployment down the road. If you are planning to implement and launch multiple modules in parallel, you'll have to plan for stakeholders that have interests across modules; module-based meetings will have to be scheduled in a staggered manner so that critical decision-makers can be present at each of them.

Internal drivers may also impact an organization's decision to take a phased vs. big bang roll-out approach. For instance, if a Performance system must be in place to support the annual performance cycle at a certain time during the organization's fiscal year, the Performance module will likely be the first one to go live.

RELEASE ADDITIONAL FEATURES OVER TIME

Organizations may also decide to start with a release of basic functionality either within a specific module or across multiple modules to expedite launch of the system, while reserving some of the more complex features to release at a later point. For example, basic compliance training could be rolled out for learning initially, followed by career and skill development training and enhanced features, such as badges and learner-driven playlists, at a later time. In Performance, often goals and annual performance review cycles are implemented upfront, with continuous feedback and career conversation features introduced over a longer period. Creating a strategic roadmap of how features will be rolled out within a module as well as across modules will help provide transparency and enable stakeholders to see the big picture.

ITERATIVE PROCESS

There are certain foundational elements that must be considered when implementing a cross-module system, such as the organizational structure, the user profile, and the landing or welcome page. Requirements across all modules for these areas can either be collected upfront or handled in an iterative approach where the element is configured to support each module as it is implemented. Consider this scenario: An organization plans to roll out several modules in a phased approach, starting with Performance. They begin by building the user profile and organizational structure to support performance-focused requirements. Once the Performance module is in place and it is time to implement the Learning module, learning requirements may require additional user fields or changes to the organizational structure. These elements would be re-evaluated as part of each subsequent implementation as needed. This would be an iterative approach versus an effort to gather all module requirements and design the foundational elements when the first module is implemented. Successful organizations go into the implementation knowing that some level of iteration will take place over time, and they allocate time in the project plan to address these issues.

CHANGE MANAGEMENT CONSIDERATIONS

A fundamental principle of a cross-module implementation requires getting buy-in from employees first. Unfortunately, change management tends to take a back seat when organizations gear up to launch cross-module implementations. To combat this problem, companies should assess their company culture and make a decision about which roll-out approach employees will embrace more favorably.

QUESTIONS TO CONSIDER

- How does your organization currently handle company-wide changes?
- Will it reflect poorly if your organization does not roll out all the modules at the same time? Has an expectation already been set, through a corporate objective for example, for a big bang approach?
- Is it more realistic to do the training, marketing, and change management activities in a phased approach?
- Has enough time been allocated in the project timeline to handle iterations?
- Are there internal timeline commitments that will drive the rollout schedule (e.g., Performance module must be implemented in time to support the next annual cycle, etc.)?
- Do you have the resources needed to support the rollout of more than one module concurrently?
- Based on your use of the system, is there a logical sequence for change management (e.g., Learning communications are distributed to support annual compliance training period, introducing Career Conversations prior to succession calibration reviews, etc.)
- How quickly does your organization adapt to change?
- Do you have any project deadlines that may impact the timing of module go-live dates?

PART 4

Align on Foundational Elements

GATHER MODULE REQUIREMENTS

Within a talent management platform, there are several core elements that lay the foundation across all modules. Regardless of the implementation approach, it is a best practice to collect system and functionality requirements from stakeholders across each process area as soon as possible. Ideally these are gathered and documented as part of the planning phase, if they were not already identified to inform the vendor selection process. This helps to ensure that the core system elements are set to support all modules, and minimizes rework if a phased deployment approach is used. One of the ways to accomplish this critical task is through a series of requirements gathering and business process alignment workshops. Individual workshops can be conducted for each module, resulting in a set of high level requirements to support the intended future business processes of each area. If this approach is not possible and requirements must be determined separately during each phase then it is a certainty that some level of rework will be required. This should be budgeted into the timeline as well as from resource and financial perspectives.

A common misconception around requirements is that if they were gathered as part of the RFP process the work is done. However, requirements gathered during RFP typically include all items you *hope* the system will be able to do. During implementation, organizations need to gather the requirements the system *needs to do* to support their intended use of the system in alignment with business processes and objectives. The requirements for an initial deployment could be a subset of the RFP requirements, and often they are more detailed than what was originally presented to potential vendors. Putting in the effort to determine which requirements are relevant at the current point in time based on the selected roll-out approach is critical to the success of the implementation.

QUESTIONS TO CONSIDER

- Is it feasible for your organization to host module workshops during the initial planning phases of the project?
- Which stakeholders should be included in the process/ requirements workshops?
- Which members of your team will participate across all module workshops to gain a cross-module understanding of the system needs?
- Who on the project team will be responsible for compiling the collective set of requirements that come out of the individual module workshops?
- Who will be responsible for reviewing the resulting document for conflicting requirements, and how will these be resolved?

IDENTIFY AREAS OF ALIGNMENT AND GAPS

After requirements have been documented, the next step is to review and assess the requirements collectively to identify areas of alignment as well as gaps between the modules. For example, if the performance team requires the use of competencies as part of their annual review process and assigns development activities--including training--based on competency gaps, but the learning team indicated that competencies would not be needed to support the assignment of learning items in the system, there is clearly a disconnect between these groups that will need to be discussed and resolved.

Ensuring that you have established a clear governance structure, created a cross-module communication strategy, defined a specific roll-out approach, and aligned on foundational elements will help create a solid foundation for your cross-module implementation. Maintaining this framework through your implementation as well as post-deployment will enable you to establish the synergy needed between key stakeholders to better optimize the use of your system and accommodate change over time.

For more information on how to optimize the technology supporting your talent management efforts email us at **info@educegroup.com**, or visit us at **www.educegroup.com**.

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