10 Steps to a Successful Talent Management Solution Implementation

By Skip Marshall, Intelladon

When companies purchase an integrated learning and talent management solution, often their biggest challenge is implementing it effectively and efficiently.

Today's integrated solutions are extremely robust and clearly necessary. According to a 2012 report from the Aberdeen Group, the demand for talent management technology is escalating as organizations face pressures such as résumé overload, shortage of critical skills and flight risk.[1]

In Aberdeen's 2011 HR Executive Agenda report, 45 percent of companies are investing in talent management technology. The greatest investments will come in the areas of:

- Onboarding (24 percent),
- Development planning technology (21 percent), and
- Competency management technology (19 percent).[2]

But the return on investment can be compromised if an organization fails to develop and adhere to an implementation plan. Without a plan, the implementation can easily veer off course with disappointing results.

What makes the implementation of an integrated learning and talent management solution especially challenging for a company? There are two distinguishing characteristics:

1. In most cases, the functional project team has little or no experience implementing this type of solution.
2. Project team members are required to perform their regular responsibilities in addition to committing their time to the implementation.

Organizations can overcome these challenges if they find an experienced implementation manager to lead them through a logical 10-step methodology. Many companies choose to hire external solution integrators that specialize in talent management implementations and have developed best practices and expertise through multiple implementation projects.

This article describes each of the 10 steps and highlights one company's journey to implementing their first integrated learning and talent management solution.

Step 1. Involve the entire project team in the kick-off meeting; communicate the project's strategy and goals.

Define and communicate a clear talent management strategy to the entire organization. Communicate clear goals for the talent management implementation to the entire project management team (internal and vendor), including which parts of the process will be automated and the associated time lines.

In the interest of saving time and money, some companies invite only management resources to a project kickoff meeting. But, including all team members, from the executive sponsor to the technical team and the subject matter experts, ensures that everyone is hearing about the project's goals at the same time.

It's at this kick-off meeting that the implementation manager:

- Reviews the project's requirements,
- Defines each team member's role and responsibilities,
- Communicates processes, time lines and deadlines,
- Explains the implementation methodology,
- Outlines implementation steps from start to finish, and
- Reviews critical success factors.

This meeting is crucial because this is when the implementation manager provides an overview of the entire project to all of the team members. It gives everyone the opportunity to view the project plan from start to finish, become familiar with key milestones, ask questions and raise concerns.

NRG, a *Fortune* 500 company and one of the country's leaders in providing clean energy solutions, recently finished its implementation of a talent management solution, which included learning management, performance management and social media modules. Looking back to

Allocate proper resources at the start of the project and ensure that they remain committed throughout the project.

the beginning of the project, Patrick Nelson, manager of Training Development at NRG, can testify to the importance of this step. His advice: "Make sure your project team members understand the scope and their role on the team."

In addition, he believes that this is also the ideal time to ensure that the team is educated about the product itself. By understanding the features and functions of the solution, team members are better positioned to execute.

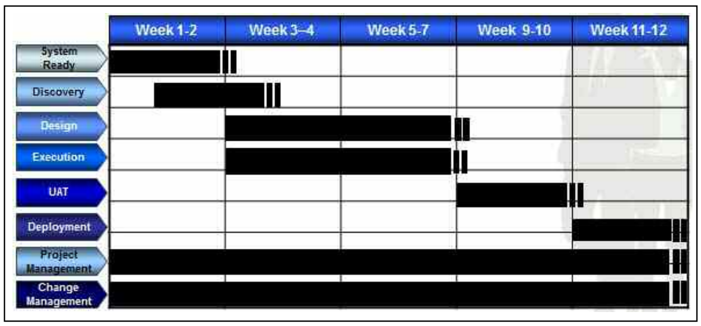

Figure 1. Sample Timeline – A typical implementation will take approximately 8-12 weeks for an initial talent module based on scope and complexity.

Step 2. Choose the right resources; engage a committed project team.

Allocate proper resources at the start of the project and ensure that they remain committed throughout the project. This includes the project manager, administrators, technical resources and subject matter experts.

For most companies, the job responsibilities associated with implementing an integrated learning and talent management solution are in addition to the staff's everyday activities. And, that's where many implementation projects fall behind schedule. This is because many project teams have a difficult time juggling their regular jobs and making time for the project.

This is another reason why a kick-off meeting with all the project team members is so important.

It's at this meeting that resources get a grasp of the time commitment necessary to ensure the project's success. If team members aren't aware of the time that they'll need to devote to the project, it's likely that the project will stall. Since every team member has specific responsibilities that ensure the success of the project, it's important that each person – including the project manager, the system administrators, technical resources and subject matter experts – understands the time they need to allocate.

During the kick-off meeting, the implementation manager will explain the resource commitment. Because this manager has led multiple implementations, he or she has a solid estimate of the number of hours each team member will need to devote to the project, and when the hours should be devoted. The sooner the members know the time commitment, the sooner they can raise a red flag if they are over-committed.

But, initial resource allocation isn't enough. Those same resources must stay engaged and committed throughout the length of the project. If a rapid implementation methodology is being followed, then the commitment is typically 12 weeks. When a project starts, the initial excitement typically keeps members engaged. The project manager is responsible for keeping those resources committed week after week.

At NRG, this step was easily accomplished. Although they didn't have a dedicated implementation team, the implementation was a priority for the company so members were able to carve out the time they needed to devote to the project. The core NRG project team consisted of:

- A project manager from IT,
- The manager of Training Development as the team leader for learning management,
- The director of HR as the team leader for succession management, and
- The manager of Communication as the team leader for social media.

For each area, the team consisted of at least two specialists, plus IT support for the technical aspects of the implementation such as single sign-on and integration with their human resources information system (HRIS).

Step 3. Always document your requirements.

Take the time to complete the detailed discovery documents to communicate to the entire project team (internal and vendor) not only current requirements, but also new desired requirements.

It's not uncommon for a project to kickoff before all the requirements have been gathered. Implementation time lines are usually quite ambitious and many times, projects seem to be behind on day one.

In the organized chaos that occurs when an organization is trying to get a project started, sometimes the task of documenting the requirements falls by the wayside. However, this is an essential step and one that shouldn't be minimized.

A discovery document captures all the details of the solution's intended functionality. Some examples include defining the workflow process for performance reviews and training approval, as well as having clarity on what information will be critical to capture and comparatively rate for succession planning.

Without a discovery document, a project team can easily be:

- Working towards different goals,
- Operating with different priorities, and
- Missing important processes and/or deliverables.

Discovery and design documents communicate the complete requirements to everyone on the team so that there is no disconnect between the business requirements and what the implementation team must accomplish. It ensures that everyone is on the same page throughout the implementation. And, it helps the implementation manager identify when the project might be going in the wrong direction.

Just like resource allocation, simply identifying the project requirements in the beginning is not enough. The discovery document must be updated as the implementation progresses. Every project team is going to learn about new system functionality as they become more familiar with the solution they're implementing. Any additional requirements or changes in requirements also need to be included in the discovery document.

When your integrated learning and talent management system goes live, its operation should closely match the detailed discovery document.

Comprehensive discovery documents also save the project team time in the last phase of implementation when it is time to prepare user acceptance test cases. In addition to presenting scenarios that define functionality and guide the implementation, these documents should serve as the basis for test cases which are necessary to ensure that required functionality is fully tested before release to end users.

Step 4. Plan your data design to reflect your goals.

Plan your data design for the talent management infrastructure carefully and thoroughly, incorporating feedback from both the functional and technical teams. Keep the end in mind, i.e., the data structure needs to support the types of reports, security roles, training assignment, and performance review assignments that will be required.

Data structure and data design are extremely important to the usability of the system. A successful implementation requires that the right team members participate in the data design and that they identify the right data.

Plan your data design for the talent management infrastructure carefully and thoroughly, incorporating feedback from both the functional and technical teams.

If this step is not executed properly, then once the system goes live, users will have problems:

- Extracting data for the type of reports they need,
- Assigning security roles, and
- Easily assigning training or performance reviews to the right groups of users.

This area is the single biggest culprit of project time line delay. If the project team does not have the IT or HRIS resources committed to the project, the correct data will not be extracted from the HRIS to meet the project time line.

Step 5. Learn the system inside and out.

Dedicate the necessary time for administrators to learn the system. They will need this training less in implementation, but more importantly to ensure their comfort navigating and using the system in production.

How well your entire organization accepts its new learning and talent management system depends heavily on how well-trained your administrators are. If you roll out your new system and administrators are not able to quickly respond to issues that arise from users, system acceptance declines rapidly.

The best time for your administrators to go through the training and learn the system is during the implementation phase. Then, they are prepared and comfortable with administering the system post-implementation. If possible, the training should be completed just before implementation or in a just-in-time basis and planned around specific implementation tasks. This way, when the implementation manager is guiding the project team through setup and configuration, team members are not seeing the system features for the first time and administrators are prepared to ask questions and apply what they've learned.

Some examples of functions your administrators should be able to do are:

- Modify system preferences,
- Create new security roles, assign permissions and constraints,
- Import training courses,
- Build new training curriculums,
- Schedule instructor-led training sessions,
- Set up automated training enrollments based on user criteria,
- Cascade company goals across the organization,
- Assign performance review tasks and re-open performance reviews,
- Remove incorrect items from user transcripts, and
- Create and run reports, and much more.

NRG excelled at this step because its system administrators were dedicated to the success of the project. This was no small feat as administrators of robust integrated learning and talent management solutions usually go through 20 to 30 hours of online training that is prepared and packaged by the solution provider. The training that the NRG administrators took walked them through everything they needed to know about the system so that they were well prepared to go live.

If a company delays the training until after launch, this typically has an adverse effect on the usability of the system.

Step 6. Plan, and then track…everything.

Complete a detailed project plan to keep track of all tasks, deliverables and time line commitments.

Project plans communicate the status of the implementation project to a project team. A plan usually consists of:

- Tasks,
- Activities,
- Milestones,
- Dependencies, and
- Resources.

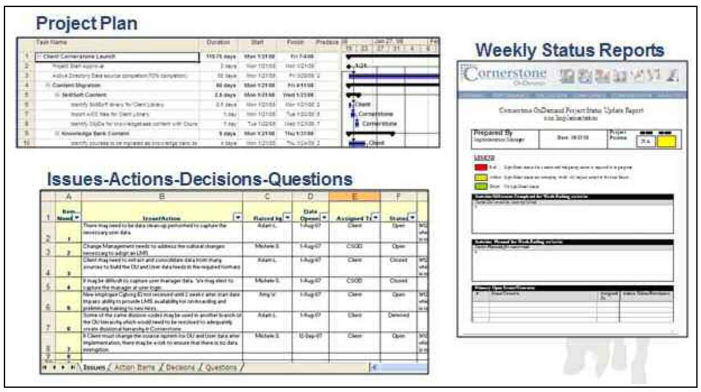

Figure 2. A detailed project plan tracks all tasks, deliverables and time line commitments.

An implementation project has a minute chance of succeeding without a project plan that identifies all of the necessary tasks, when they're due and who's responsible.

The problem most organizations have is that, since they've never implemented an integrated learning and talent management solution, they don't really know how to begin putting a project plan together. For example, many of the implementation tasks are dependent upon organizational unit and user data. Therefore, if the organizational unit structure and design are not completed by a specific point early in the project, other dependent tasks such as assigning security roles, training, performance reviews, etc., cannot be configured and tested.

NRG engaged an external talent management solution integrator to provide it with an experienced implementation manager who built the project plan that included many implementation tasks that the company was unaware of. That implementation manager was responsible for overseeing the entire project (including several internal project managers whose job it was to manage specific teams) and maintaining the plan.

The project plan is also used as a communication tool throughout the project. By executing the plan, the implementation manager works alongside the project team to ensure all tasks are being executed on time.

A good plan also identifies project risks and enables the implementation manager to identify a plan to mitigate those risks.

Step 7: Communicate weekly.

Conduct weekly status meetings to review accomplishments, task status and open issues, plan assignments for the next period and address risks.

For organizations that are new to the implementation process, a weekly status meeting can seem unproductive – time that could be better spent working on all the tasks that are listed on the project plan.

But, anyone who's been through an implementation can testify that these weekly status meetings can make the difference between the success and failure of the project. The project's progress depends on everyone staying on schedule and *everyone* raising issues or identifying roadblocks.

Weekly status meetings are really the most efficient way to communicate with the entire team, to hold the team accountable to their assigned tasks and deliverables, and to escalate risks.

An implementation manager uses these status meetings to make sure everyone understands their upcoming deadlines and deliverables. Assuming the implementation manager has extensive experience with implementations, the status meetings are also an opportunity for that manager to educate the project team on how the system works. This way, once the implementation is completed, the team is better equipped to support the system.

NRG initially had two project teams – one for the learning portion of its system and one for the talent management portion of its system. In retrospect, Patrick Nelson, NRG's manager of Training Development, explained that to accommodate an aggressive schedule, there were periods during the implementation when the two teams did not come together for a single weekly status meeting. He noticed that communication fell off during that same period. He stresses the importance of having not only weekly status meetings with the implementation manager, but also team status meetings to find out how everything is progressing.

Weekly status meetings are really the most efficient way to communicate with the entire team, to hold the team accountable to their assigned tasks and deliverables, and to escalate risks.

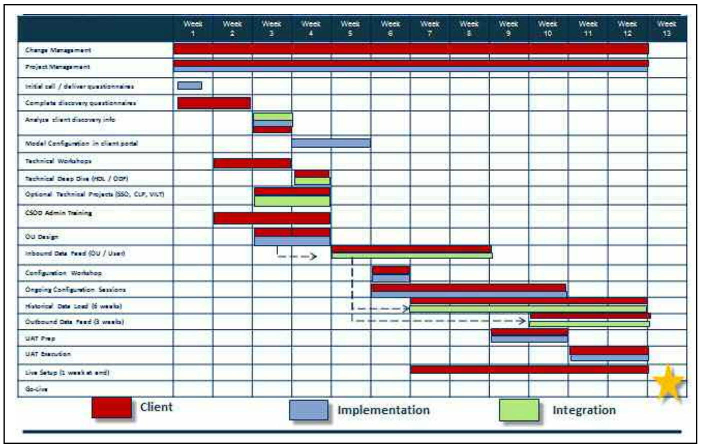

Figure 3. Weekly status reports are an effective way to communicate with the entire project team and to hold the team accountable to their assigned tasks and deliverables.

Step 8: Test, test and…test.

Plan and perform thorough testing of the system through a formal user acceptance testing (UAT) process. Time spent here will ensure a very smooth "go-live."

Testing an integrated learning and talent management system before *going-live* sounds like a good idea in theory. But, for some organizations, it may not seem practical when the time comes. You're barely staying on schedule. Your resources are in short supply. Wouldn't it just be easier to *go live* and fix later?

In short, "no," this is not a step you want to skip. It's during UAT that you determine if the system, as it will be implemented, meets your business needs. This is also where you can check to ensure that integration with an existing HRIS is seamless.

Because integrated learning and talent management systems are comprehensive and touch so many groups within an organization, this step is critical to ensuring that each end user is getting what they want and need from the system.

For example, are they able to easily run reports that show them who has completed the annual compliance training? Can they access the complete database of learning assets?

Another benefit of UAT is that it helps users become acquainted with the system before it *goes live*. The UAT team can explore the system without fear of "breaking it." In fact, if orchestrated properly, UAT will highlight areas of the system that are not working as seamlessly as needed for users. Typically, this will result in some changes being made to configuration and training materials. User acceptance training is also great word-of-mouth PR before the release of the system, helping generate excitement and anticipation.

Step 9: Don't delay.

Don't try to get the system perfect. The system should be flexible to allow you to continue to populate with content and evolve with your processes. The sooner you go live, the sooner you begin to realize the benefits.

Launching their first integrated learning and talent management solution is, without a doubt, a source of pride for companies. And, it should be. But sometimes, organizations lose sight of the big picture business goals and get caught up in all the functionality. The delays begin. There's the 5,000-title content library that the IT training group would like added. There are the hundreds of instructor-led training sessions to be set up and thousands of documents to load into the document repository.

If you plan your implementation in stages, you can *go live faster* (in as little as 8 to 12 weeks) and begin to experience the benefits of your new solution. For example, many companies start by implementing learning management, followed by performance management, succession management and then compensation management. NRG tackled implementation of the learning management and succession management modules concurrently but with two separate teams, while implementation of the performance management module is scheduled for 2012.

Make sure that the module of the solution that you're launching works well so that it will be received well. And then…*go live!*

Step 10: Communicate!

Get the organization excited about the benefits you expect to realize from the system, both for the company and for them personally and professionally. Let them know what is coming so that they have time to plan for the new system and the changes that may be required.

As an implementation nears completion, project teams start feeling tired. They've had an implementation manager and a project manager pursuing them constantly to keep them on task. They've planned, they've tested, and they've attended the weekly status meetings. It looks like "the end" is in sight. The majority of the work is behind them and they can get back to the full-time jobs they were hired to do.

But, there's one more task and that's to communicate the solution to the entire organization. Your project's success can't be measured by "we launched on time" or "we came in on budget." It must be measured by whether it helps your company meet its strategic talent management goals and whether employees are actively using it.

Remember your original goals of implementing an integrated system and make sure that you share this with the organization. Refer to the original justification for purchasing the system and emphasize those benefits to the organization. This might include:

- Career development opportunities made available through a large content library of online courses available in the system,
- Automated goals management, competency assessments, and performance reviews that allow employees to receive ongoing feedback about their performance to help them meet goals and bonus objectives, and

- Succession management that helps to identify career progression opportunities for employees.

Whatever the justification for the purchase of your system, this should be communicated to the entire organization to get them excited about using the system.

Some companies will have an official launch with communications campaigns to raise awareness. Other companies, such as NRG, used a soft launch approach. They scheduled their *go-live* near the end of 2011, around the holidays. They started communicating the *go-live* to a smaller group (those managers who weren't taking vacation at that time) and then those managers were able to communicate and educate others.

In addition, NRG leveraged their Communications department to market the new solution to employees. That group also had a vested interest in the solution because they were using a social learning module to set up informal learning communities. The Communications group used webinars and other forms of communication to market the solution to the user community.

Conclusion

Purchasing an integrated learning and talent management solution is a major investment for many companies. Organizations that follow a regimented implementation process led by an experienced implementation manager will have a solution that meets the company's talent management goals and strategies.

Endnotes

1 Aberdeen Group, Infusing a "Talent First" Culture through Integrated Talent Management, January 2012.

2 Ibid.

About the Author

Skip Marshall, vice president of Professional Services for Intelladon, is responsible for ensuring clients receive the right solution customized to their needs. His wealth of knowledge and passion for learning has proven to be an invaluable asset to the Intelladon team. Marshall has extensive experience in instructional design theory, integrative content design, learning program solutions and learning systems integration, allowing clients to receive the most tailored approach to their learning and talent management needs. He is an alumnus of the University of Florida where he earned a Master of Education degree with a focus in Educational Psychology, as well as Specialist degree in Instructional Technology. True to his belief in life-long learning, he went on to receive his MBA from the University of Florida. He can be reached at ***smarshall@intelladon.com***.