

WISE CONSULTING ASSOCIATES INC

finding the ideal talent management solution: bigger isn't always better

Wise Consulting Associates, a Maryland-based firm, has been providing Human Resources and Payroll Management support services since 1996. With a 'work hard, play hard' culture, the company wasn't too hung up on HR policies and procedures but was facing an increasing need to formalize its HR function – minus the bureaucracy.

Perhaps surprisingly for a company dedicated to helping others' find and implement HR solutions, Wise Consulting operated for over 10 years with no formal performance management system in place. But the company was growing and employees indicated a desire for more feedback, so the team, lead by President Jennifer Wise, HR Director Karen Anikis and Practice Director Chris Davies, began hunting for the perfect way to manage performance.

The catch? They already knew the market, and knew the big players wouldn't suit the company's culture. So they needed to dig a little deeper...

Environmental Factors

Despite helping scores of companies find, implement and make use of HR systems, Wise Consulting worked well for years without formalizing its own HR processes.

"Our performance management was very unstructured. We were basically working under the assumption that people knew they were doing a good job when they got their raise. We were really just letting our people censor themselves."

But the company had outgrown the current system (or lack thereof), and a 2007 Employee Engagement survey indicated that employees wanted a formalized review process and higher level of feedback. Despite having a wealth of marketplace knowledge, the team nevertheless found it extremely difficult to find just the right system to fit the company's culture.

"We had the ideal system in mind, and in the absence of finding that perfect system, we did nothing. It was a matter of making time and trying to balance that vision of what we really wanted to have against what was available. We'd been through the usual vendor selection process with a client around talent management, so through that and our industry work we were quite knowledgeable about the marketplace. Off the top of our heads, we knew that none of the systems we'd looked at would work – they were way too structured and too expensive.

It was really frustrating! We knew what we wanted to do, and we knew the big systems weren't the answer for us." The 'ah-ha' moment came for Jennifer at the HR Technology conference in Chicago at the end of 2008, where Sonar6 was presenting at a Cool New Tools session.

"I saw Sonar6 present and came away thinking 'this is perfect!'"

Requirements

Wise Consulting's ideal system wish list consisted of both 'wants' and 'do not wants' – the team ruled out the bigger vendors, and they definitely weren't interested in a paper-based system.

Specifically, the system had to:

- Be able to pool individual review information to answer 'what does this mean to the company?'
- Be credible to employees and managers
- Focus on strengths instead of weaknesses
- Be interactive
- Support ongoing performance management – not just filled out once a year & filed away
- Be cost-effective
- Have reporting capability for extracting / analysing data
- Provide a consistent and equitable way to match merit increases to individual performance

"We also needed not only to find a way to link individual performance to company goals, but to keep it something that people enjoyed doing. We knew that going from nothing to something had to be something, and we knew a paper-based system wouldn't work. We couldn't make our managers fill out boring paperwork and have a 10-minute conversation with employees: we were really looking for something that fit within our culture."

And of course the ideal system would support the improved performance conversations and provide the feedback Wise's employees were looking for.

"We struggled with it for a very long time, until we saw Sonar6. Then we were like 'this is how we do it!'"

Results

On positive performance reviews

We weren't keen on the typical performance review; spending 5 minutes talking about what's gone well and half an hour going over how things have gone badly. The way you get your overall rating in Sonar6 is just so much more positive. Nobody walks away thinking 'I should have scored higher'.

On interactive implementation

Suzie had a lot of good ideas and best practices that we could evaluate. If we had a question, she'd think about what other clients were doing and how we could make it work in our environment. If we found something hard to visualize, she'd set up a test person and walk through it on the screen with us so we could get a better idea of how things would work.

On timezones... what timezones?

When we were going through the contracting phase and found that Sonar6 was in NZ, we were concerned about how it was going to work being in different time zones. But quite honestly, we didn't have any

problem with it: the time zone difference really wasn't an issue and they made themselves available whenever we needed.

On the difficult conversations

Sonar6 helps us have difficult conversations with employees on merit increases, especially right now when the market's tough and increases may not have been what we wanted. We can have a much more positive face to face interactive conversation between managers and employees, and include the positive aspects of performance as part of that discussion.

On benefitting the organization

Sonar6 is a huge benefit from an organizational point of view; we can focus on areas of concern, and take action to develop them – whether it be training, adding skills etc. It's given us a really good foundation to start managing performance in a way that's consistent, fair and equitable, and helps bring credibility to what we're doing.

On what you already know

One of our managers, after going through the evaluations and reading the Kites and the summaries said, 'I thought I knew how things were going, but this really brings it home' – Sonar6 is right on the money.

Sonar6 Solution

The team was cautious not to make the project too big at the beginning, as they were essentially creating the company's performance management program from scratch. They initially chose to work on measuring competencies with Sonar6, with goals and 360 reviews to come in the next stage. The first step was going back to basics and identifying the roles currently held in the company, and then working with Sonar6 Implementation Consultant Suzie Valentine to tailor a set of competencies to suit.

"We went through the competency library and defined our performance and organizational competencies, and the behaviors and questionnaires we wanted to go with that. From there we reviewed it with our practice managers to make sure it made sense – we did do some tweaking, but having the library to start with was a great help."

Implementation of Sonar6 took a little under 60 days to complete, with the management team the first to use the system. While Wise Consulting created customized training and user guides, they were pleased to discover training users in Sonar6 really wasn't a major undertaking.

"We trained the management team first, then held a few training sessions with our employees. It was so easy to understand and user-friendly though – we didn't need much training at all."

As it turns out, the team didn't have to do much to fit Sonar6 to the company – mostly 'wise-ifying' the competency library and disabling the goals and objectives functions. Adjusting to using Sonar6 was similarly painless:

"It was a pretty typical learning curve – just getting used to the system, understanding the competencies... and taking the time to do a proper review and have the conversations around performance.

The response from employees was very favorable; everyone was really excited to use it."

Summary

Sonar6 is enabling Wise Consulting to make performance management an active part of its culture – without making the company change its unique atmosphere, and with the full support of employees. Management now has a much clearer view of performance, and an easier way to answer the important 'so what does this mean for the company?' questions.

"Strategically, we're using Sonar6 to make decisions regarding training, career development, job planning; now we can see what we need from an organizational, department and individual view."

Because Wise Consulting had a good idea of what they wanted in the system before looking at alternatives, Sonar6 has allowed the team to easily translate their informal HR systems into something more concrete:

"Sonar6 has allowed us to crystallize our own thinking on what makes someone successful, and then communicate that to our employees. It's important people understand what we think makes them successful as it ties in with our client engagement surveys. Because we have consultants that work on a number of teams, internally as well as with our clients, we're really looking forward to rolling out 360 reviews at the end of the year."

And because they knew what they didn't want, they avoided a lengthy process of evaluating software that just wouldn't have been the right fit.

"A lot of companies we see are looking for Talent Management suites, and a lot of them probably don't need something that complicated. We knew a big system wouldn't be right for us, and we found Sonar6. It gives us a lot of bang for our buck - more companies should use it!"

www.sonar6.com

888 9SONAR6

11th Floor, 505 Montgomery Street
San Francisco CA 94111

