

## **PST Bares the Truth** **Straight talk about performance management software,** **myths and reality**

- ✚ What most people in management looking at software are secretly wondering and wishing for...
- ✚ What they are afraid of...
- ✚ What they are unaware of...
- ✚ Four steps key to being a success with [management software](#)

PST's candid review of its 15 years of pioneering experience to help you move ahead of everyone else searching for more performance and productivity through software.

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### ✚ **What most people looking at software to improve performance are wondering and wishing:**

1. By far the most commonly reported question is "Can I track all the stuff I need to, and create reports easily?" "Will it make the demands of tracking and reporting on stuff easier?"
  - ✓ Will it track everything from action steps, to sales leads, to project milestone, to today's tasks and do so in a way that doesn't provide one more to-do list and organization system? Will it be more capable than what we currently use... and still make work easier? Will it meet my needs and not box me in... not limit me in the future if I need to use it for more than I am currently, or need to tie in other groups?
    - ✚ The answer is, **"Yes it can."** PST software is very flexible and used by all types of different business and vertical markets. But here's the important criteria for stating Yes:

Can you frame work in terms of: 1. Objectives, 2. Plans to reach those outcomes, and 3. A place to summarize and store results? If you can, then you can track and report on almost anything... and do it in a simple, quick manner with PST's software.
2. The most commonly expressed wish is for ease of use - which typically means a very short learning curve to achieve basic competency, to be able to put the program to work for the user.

- ✓ It's often expressed something like this, "Is this something that will be easier to learn, I don't have all day, neither do my people... and I don't want this to be a burden for them, everyone already has more than they can accomplish on a given day."

- ✚ The answer is **"Yes, if learning can be approached in stages and a style that best fits the use."**

Rapid (perceived as easy) learning is driven by four components:

1. For Visual learners – Primary concepts and skills to be mastered for each stage are presented with visual graphics on one page – a "cheat sheet."
2. For Reading based Learners – Concepts and skills to be mastered are presented first in an over-view page, then in subsequent pages with greater clarification and more detailed information. Reading resources move from one a 30 page entire software summary, to a 500+ page detailed manual.
3. For all learners, and especially people who learn by working with the program, short, one-on-one individualized training over the web and phone accelerates and customizes the learning process for each user.  
PST provides all three resources to transform highly capable software with many features into easy-to-use business tools.

3. The most common undisclosed wish is that the software would be an agent of change to fix others.

- ✓ Most people purchasing performance and [project management software](#) want productivity and effectiveness at work to be better, not just easier. Although they are looking for a tool, they actually want behavior change as well.

- ✚ This is such an important distinction and a critical wish that we focus upon it directly at the end of this document on the four key steps for success.

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- ✚ **What most people in management, looking at a software purchase, are afraid of:**

There are two basic fears that everyone seems to brush up against, especially when purchasing software for a group of direct reports or an enterprise.

## **Fear #1 – “If I purchase it, will people use it?”**

- ✚ The first part of the answer is a response that you are asking too global of a question. We suggest you consider asking it this way, “If I purchase the software for a team or enterprise, will everyone uniformly adopt and use it?” To that question, the answer is **“No.”**

Let’s go further. Historically every group has three types of users:

- Early adopters – who enjoy learning new software and routinely adopt what’s purchased, if they see it as an advancement over existing tools.
  - Follower adopters – if everyone else is using it to solve widely recognized problems or needs, and it’s visibly the standard, they will adopt and use the tool as well. They typically don’t fully adopt until it has been established and verified that this is new standard, not just a “flash in the pan.”
  - Reluctant adopters – these users need insistence and follow-up from the top to adopt a new tool. They definitely need insistence that they adopt if they are engaging in passive resistance. Sometimes they need a confrontation, and sometimes they need to be told “it’s either use the new tool or work somewhere else.”
- ✚ The second part of the answer is that people adopt and use software for a variety of motives. If you want to feel secure about obtaining a high adoption rate, you will need to plan and conduct the software roll-out such that it addresses the motivational drivers for all three groups of users. There’s a third part of knowing what drives adoption and usage of the tool, and that’s facing up to how much behavior and process change is involved, but it’s discussed in detail under the four keys.

## **Fear #2 – “If I purchase it, will I be challenged, embarrassed for making the purchase?”**

- ✚ The best answer we can give you to this is **“Probably”** and **“That’s up to you.”**

Let’s explain: Our rule of thumb is that any purchase that includes a change component typically gets challenged sooner or later, either actively or passively. The biggest predictor for determining if the person being challenged get’s embarrassed is this – Have they done their homework... completely?

Very often people think they have completed their homework when they have researched three vendors, and have compared features

and price. Wrong. You're not really prepared unless your homework has included identifying the problem to be solved with the new technology, its cost, and the degree to which the problem is supported by current cultural work practices and attitudes. We'll discuss this in more detail in the next section, but your homework should also include an assessment of the readiness for change and adoption of new tools in the prospective users, and what we call "process match." You probably figured it out by now, but yes, we'll discuss that in the four key steps. Anyway, do your homework completely, and you can confidently address challenges, not be embarrassed by them.

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### **What most people in management, looking at a software purchase, are unaware of:**

Most software purchasers have not taken the time (sometimes faced the discomfort) to identify the problem and figure out how much it costs them before they set out to purchase a software solution.

Part of the basis for not getting a fix on the cost of a the problem seems to be because it seems so very human to figure out "there's gotta be a better way", without getting clear about what isn't working about the current system. The push to find a solution without understanding the problem completely gets exacerbated when the software is perceived as the solution, when in fact it's really enabling a solution. We'll get to that in the four keys, but meanwhile, let's go over a simple, direct means of establishing a cost of the types of problems you would be solving with the kind of software tools PST provides.

### **3 Standard Problem Assessments – apply to one of your direct reports:**

1. Every day, does your direct report have an accurate (concur with your priorities) sense of what are the top three deliverables that have to be accomplished?
  - Answer: Yes or No \_\_\_\_\_ 3 hr?  
If No, add 3 hour/week loss or mis-spent on/or over-extended on low priority tasks
  
2. Every day can you find within two mouse clicks written feedback on what was accomplished on key tasks and objectives, or do you have to call, email, catch in the hallway or schedule/attend a meeting?
  - Answer: Yes or No \_\_\_\_\_ 1 hr?  
If No, add 1 hour/week loss or mis-spent on tracking down status results

3. Every day does your direct report work a visible plan (that you have reviewed) towards reaching key objectives?
  - o Answer: Yes or No \_\_\_\_\_ 5 hr?  
If No, add 5 hour/week loss or mis-spent on responding to the next "urgent" thing, where working the plan becomes non-urgent

OK, so whether you have one or 15 direct reports, you can get a sense of the amount of time that is not being optimally used, some would say lost, given these common work practices – which turn out to be a problem.

Now let's go over a quick method of determining the cost.

1. The Value of Time	(# of lost hours/wk)		Yearly Expense			
Direct Reports Salary	Salary/vs. Hourly Cost	\$ 40,000	\$ 60,000	\$ 80,000	\$100,000	\$120,000
(Hours per week lost	Hours/wk 1	\$ 1,000	\$ 1,500	\$ 2,000	\$ 2,500	\$ 3,000
Followed by the annual	2	\$ 2,000	\$ 3,000	\$ 4,000	\$ 5,000	\$ 6,000
dollar loss at given the	3	\$ 3,000	\$ 4,500	\$ 6,000	\$ 7,500	\$ 9,000
direct report's salary)	4	\$ 4,000	\$ 6,000	\$ 8,000	\$ 10,000	\$ 12,000
	5	\$ 5,000	\$ 7,500	\$ 10,000	\$ 12,500	\$ 15,000

Take a good look at this. It's very helpful homework to review. This means if the total cost for a direct report is in the \$100,000 range, and they lose just one hour a day, or 5 hours/week, given some combination of the three problems listed above, it is generating a cost of \$12,500 in lost time alone, not to mention costs incurred because of mistakes to due sub-optimal collaboration and coordination.

## ✚ Four key steps to being a success with performance management software

### 1. Less is More

This is very important to understand. Our first step, when considering what information to address and track in a tool like [ManagePro](#) or [MProLite](#), is simply this – be brief, start with a little to make a lot of progress. Imagine this - would you like your



kids to learn to swim in the shallow end of the pool or the deep end? No brainer, right? Well when you implement performance and [project management software](#), you need to start with small enough targets that users can be a success, not overwhelmed. You need to start with what's priority. Start by managing just the key objectives and projects. We are fond of limiting each department to only tracking their top three projects or goals in the first 90 days. Why?

Let's list a few reasons to support our first step, and then we'll go on to some important research:

- ✦ Learning in small chunks establishes early wins, user comfort, satisfaction and sense of accomplishment.
- ✦ Focusing on the most important creates focus on the most important.
- ✦ The key is to deliver better outcomes, not have one system that organizes and tracks every possible activity.
- ✦ Users who try to put everything and the "kitchen sink" into the software for comprehensive tracking, commonly report "drowning in the data".

Here's another important reason why less is more. One article suggested that management only needs (but really needs it accurately and timely) **4%** of the total information in the system at any one time. Give any of us more information than we need and we get over-whelmed and less effective. And by the way, most of us are swimming in too much information already, so the idea of yet another tool to create more information tasks is not a warm fuzzy for most.

Malcom Gladwell, in his book "[blink](#)," cites several studies from the American Journal of Medicine and the New England Journal of Medicine, that extra information does not improve decision making, but in fact can impair it.

Good decision and performance management benefits from a focus that addresses frugally those actions and the resulting consequences that drive outcome. The key is to be able to focus on the critical pattern that drives the system, the outcome, etc... and to be able get that information updated promptly and consistently. You can do this very capably with PST's software.

## **2. Identify and Respond to Process Mis-Match**

You will be way ahead of the game if before implementing a [manager software](#) solution; you take a moment to assess whether its adoption will simply build on existing work practices or require new ones. Technology solutions are easier to implement when they support established practices. If you already track your key projects in Excel or on paper, and/or if you daily write down in your calendar customer contacts, then engaging in the same activity in a new tool that creates better visibility for others and easier reporting for the user is a relatively small challenge.

But what happens if using the software requires the user to do something they don't currently? What if it requires them to establish a brief plan for the day before they begin – and they are used to looking at their email, listening to the voicemail and then jumping into the first meeting? What if it requires them to

key in a progress summary each week on their projects, and they are not used to doing that? Maybe they typically just give a verbal report once a month in a staff meeting. Either of these two changes indicates that the implementation of technology is but a small part of a larger change effort.

If this is the case for you, you have a process mis-match and will be using the software to drive major change - be smart and recognize and resource it as such. To drive change, you'll need planning, resources, time and money. Change does not get driven by installing software on someone's PC. Change that requires new work habits requires lots of follow-up, lots of practice and being held accountable to both practice the new process and deliver the new outcomes. Some suggest that you should roughly estimate [resource allocation](#) for a technology enabled change process in the range of 10% for hardware, 20% for software and 70% for training and coaching.

### **3. Debunk Myths with the Truth**

Make sure your thinking, your approach to software implementation, is based upon reality, not bias and unrealistic expectations. Here are some common truths that you will find essential to avoiding software implementation myths, e.g. these will save you a lot of money, time and frustration.

- ✚ The solution is usually a technology enabled process, not the technology itself. Don't get that confused.
- ✚ Technology is like a bicycle. If you/others use it, it works great and can take you long distances at higher speed with less effort; otherwise it is a burden to walk around with.
- ✚ Achieving successful outcomes is usually a function of habit change, process change, and certainly not attending a learning session. Giving people technology and a training session has about the same predictive value for usage as handing dental floss to teen-age boys!
- ✚ IT people are often not the best people to lead complex technology/process implementation. They need to be on the leadership team as opposed to the leader. See the first truth listed above.
- ✚ High performance is a work habit that is very valuable, but often needs constant upkeep. Establishing improved performance using new work habits seems to match the general literature on habit change. Experts suggest it takes practicing the new behavior 21 days in a row before it becomes the new habit - otherwise the tendency is to revert back to the old behavior.

### **4. Knowing what you are doing when you set up a software implementation**

It has been estimated that 2/3's of all complex technology solutions, such as CRM and ERP, result in less than successful outcomes. Implementing a complex technology-enabled solution is a worthwhile, but significant challenge. PST provides a number of resources for planning a successful implementation. One

example is the ManagePro Sample database that's shipped with each license of ManagePro. There are also a number of key articles available on PST's website at <http://www.managepro.com/ApplicationResources.html>

- ✦ For the purposes of this white paper we would like to review the activities we see that are typically key in differentiating a successful from a non-successful technology deployment. Bottom line, make sure you cover these steps:

1. A compelling case for changing to the new solution is made. The problem to be resolved needs to be up and in front of everyone involved, with all of its associated costs and all of the reasons why it is imperative and mandatory to not go further without resolving it.

2. Plan and resource the implementation process appropriately. This is not a process of installing software and one training session and magically you suddenly have a high performance work system in which people actively collaborate, track their progress, document their results, manage information well, daily. Understand the context into which you are deploying this solution, which includes the amount of change being requested, the technology skills and motivational drivers of the new users.

3. Burn your ships when you go ashore. By this we mean once you start the campaign, don't continue to use tools that conflict with the new technology. This is especially true in meetings. Meetings are a key "make it or break it" proving ground for performance technology. Use PST's technology to manage your meetings as you address projects, objectives and performance. Do not continue using general office tools to manage status updates, or risk creating a successful obstacle and conflict with the implementation.

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The author of this series, Rodney Brim, is CEO of Performance Solutions Technology (PST). PST develops and assists organizations in deploying performance [management software](#) solutions, and presents these guidelines based upon our work with 1,000's of companies to help ensure your success and avoid common myths in the pursuit of performance management. Performance Solutions Technology is found on the web at <http://www.ManagePro.com>