

# Checklist for Implementing an Online Performance Management System



Use this checklist when you are implementing new or replacement performance management software

Project Planning		
1	Have you formed a project team and assigned a project manager?	<input type="checkbox"/>
2	Does your project team include line managers and employees as well as HR?	<input type="checkbox"/>
3	Have you created a project plan covering the whole project from software selection through to launch and ongoing success measurement?	<input type="checkbox"/>
4	Have you assigned dates and responsibilities to each task in the plan?	<input type="checkbox"/>
5	Have you thought about risks – what could prevent the project from succeeding and how could that be mitigated?	<input type="checkbox"/>
6	Does everyone in the project team have a copy of the latest plan and know their responsibilities?	<input type="checkbox"/>
Business Need and Requirements		
7	Have you defined the business need for the software with your project team? What specific problems do you want it to solve? What are the goals for the software?	<input type="checkbox"/>
8	Have you established your success criteria for each of these goals?	<input type="checkbox"/>
9	If you have an existing system, have you sought feedback from across the business on what did and did not work well and what could be improved?	<input type="checkbox"/>
10	Have you documented your functional requirements ( <i>what</i> you want it to do) and non-functional requirements ( <i>how</i> it should do it)?	<input type="checkbox"/>
11	Have you split your requirements into essentials and desirables?	<input type="checkbox"/>
Software Selection		
12	Is the software extremely simple and intuitive to use?	<input type="checkbox"/>
13	Does the software work on all web browsers? Is it mobile responsive (automatically adjusts screen layout for tablets and smartphones)?	<input type="checkbox"/>
14	Is the system securely encrypted and is the data hosted in an ISO27001 compliant data centre?	<input type="checkbox"/>
15	Does the software encourage year-round performance management rather than just focusing on appraisals?	<input type="checkbox"/>
16	Does the software supplier have genuine performance management expertise?	<input type="checkbox"/>
17	Is technical support for the software based in this country?	<input type="checkbox"/>
18	Have you spoken to or visited other customers who use the software?	<input type="checkbox"/>

Internal Buy-in		
19	Have you prepared a business case to get budgetary approval for the software?	<input type="checkbox"/>
20	Have you arranged demos of your preferred software for senior management and key influencers to get their buy-in?	<input type="checkbox"/>
System Configuration and Testing		
21	Have you kept your online forms as simple and as short as possible?	<input type="checkbox"/>
22	Have you carried out a complete end-to-end test of your annual performance cycle using the system?	<input type="checkbox"/>
23	Have you setup and tested your processes for transferring employee data from your HR system?	<input type="checkbox"/>
Communication and Support		
24	Have you planned a variety of different communication methods (emails, videos, webinars, briefings, newsletters etc.) to introduce the new software?	<input type="checkbox"/>
25	Will staff be communicated to at least 3 times about the new software?	<input type="checkbox"/>
26	Do your communications emphasise the benefits of using the software ('What's in it for me')?	<input type="checkbox"/>
27	Does your software have integrated online help? If not, have you created separate help guides or videos that users can refer to?	<input type="checkbox"/>
28	Have you assigned a dedicated person or people to deal with system support queries?	<input type="checkbox"/>
29	Have you considered training a system 'super-user' in each department who users can go to for help or to get questions answered?	<input type="checkbox"/>
Pilot Test and Launch		
30	Have you run a pilot test of the new system with at least 2 different departments?	<input type="checkbox"/>
31	Have you updated your system, communications and support arrangements based on the feedback from the pilot test?	<input type="checkbox"/>
32	Has your IT department 'whitelisted' the email address that the software uses to send notification emails?	<input type="checkbox"/>
33	Have you done a final check of the employee data and reporting lines within the system?	<input type="checkbox"/>
34	Have you put in place processes to measure the success of your software against the original goals you set out, including getting regular feedback from system users?	<input type="checkbox"/>

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