



## Case Study

## Performance Tracking in the Digital Age: A Success Story

### BKD Employees Work Happy with SilkRoad's WingSpan™

In a recent Right Management survey of people who had quit their jobs in the last year, respondents cited the need for new challenges, ineffective leadership and undervalued contributions as the top three reasons for leaving. Developing and regularly assessing talent is crucial to keeping it, and something BKD, LLP understands first-hand.

Many companies turn to mentoring as a way to guide and keep new hires. But a recent article on talent management in the Wall Street Journal declared, "The traditional mentoring relationship just doesn't work anymore."<sup>1</sup> Pairing junior workers with their senior colleagues is quickly becoming a dated model of performance management as both workloads and demands shift in an ever-changing world. Researchers say that the most successful companies have adapted the concept of the social network to create groups of contacts for each employee.

Yet all of the networking and performance tracking means little if there is no easy way to gather and organize the data. Finding the best talent management software to track each employee's progress is an increasingly important part of running a good company. Fortunately, the availability and functionality of talent management software has arrived—and companies using these solutions find it a cost-effective investment, saving both time and money.

### Performance Tracking in Action: BKD, LLP

Headquartered in Springfield, Missouri, BKD, a CPA and advisory firm with \$400 million in revenue that recently celebrated its 85th anniversary, regularly sends out teams to work on a myriad of projects simultaneously. In 2007, the company realized that it needed to upgrade its performance tracking and mentoring system. Paper-based and cumbersome, BKD's system was no longer keeping up with the rapidly shifting changes happening in teams and projects among its 2200 employees in 30 locations across 12 states.

"It's not uncommon for someone to work on a brand new project every week with a new team," explains Randy L. Hultz, CPA and director of Human Resources at BKD. However, in this fundamentally project-based model of BKD's business, too many employees were getting lost in the shuffle. Senior management came to Hultz asking for a solution. "We were losing too many people and not picking up performance issues fast enough," says Hultz. "Our people wanted and needed feedback delivered in a consistent way." As BKD employees moved from assignment to assignment, the challenge for management was to consistently appraise employees' progress because they reported to multiple project leaders during the course of a year.

A task force determined that BKD needed to implement a coaching program that would provide performance coaches for all staff. In addition, they wanted the technology to be user-friendly. "Our previous system was not technology-based, it was paper-based," says Hultz. "We wanted to automate and streamline the process." To make the new coaching system work, they needed a powerful technology tool that could manage and consolidate all the feedback, yet be easy to implement.

### WingSpan is Right for the Job

Hultz and his team decided that SilkRoad technology's WingSpan was the best tool for the job. As a flexible employee performance management solution, WingSpan is designed to maximize employee talent and achieve business success by using your workforce more effectively and productively. A wide array of features allows multi-rater assessments, competency and skill management, development planning, goal setting and performance planning, performance and appraisal reviews, and career development with succession planning.

<sup>1</sup>"A New Approach to Mentoring" *The Wall Street Journal* (September 22, 2008)

## Results

BKD evaluated several software packages and eventually selected SilkRoad's WingSpan to pilot in four offices during the 2007 tax season. The company rolled it out in phases to the rest of the firm, from May of 2007 through August 2007. Since its debut, BKD has seen a reduction in turnover that management attributed to employees' renewed focus on key job performance expectations, and a universally improved level of confidence in the company's new employee rating methodology.

WingSpan's versatility was a key factor in the selection. BKD was able to tailor the solution to its very specific needs almost immediately. Managers revised the competencies and appraisals they wanted to use at the project evaluation level using templates provided by SilkRoad. BKD then emailed these new documents to SilkRoad, which implemented the changes immediately.

"There were a couple of things that required customization that they did for us immediately while we were on the phone," Hultz says. "I hit a couple of keys, and I saw the corrections done in real-time." The customized templates were then coded and ready for use within 48 hours. Today, Hultz realizes the value of creating very specific documents for BKD. "The one thing other talent management vendors couldn't handle as effectively as WingSpan," he notes, "was how to track performance in a team environment where both the team and the environment are constantly changing."

The new streamlined system of expectations and evaluations has already had a huge impact on BKD employees. "I will tell you that, in the year since we have rolled this program out and implemented WingSpan, our turnover has dropped significantly, particularly among our professional staff in their first year or two of employment with us," says Hultz. "Everyone in the company below the manager level, as well as administrative staff, is on a semi-annual performance appraisal schedule; WingSpan's performance appraisal tool is a real timesaver."

BKD has also found that using WingSpan's assessment tool has vastly improved communication and performance tracking. "Beyond just moving to a paperless environment, the one thing that we've benefited from is that the system is extremely easy to use from the end user's stand point," says Hultz. Project team leaders simply log in once their work is done and complete one of four custom project evaluations.

Looking back over the initial selection process, BKD had multiple criteria to meet: customization, ease of use and the ability to manage ever-changing team reporting structures across a project-based consulting practice. All of these would be vital to the project's success. "I quickly realized that SilkRoad had the tools we needed," says Hultz. "But we had many stakeholders to please. I brought in a focus group, walked them through a demo and everybody immediately liked how clean, simple, and straightforward SilkRoad's WingSpan is."

## Summary

When the appraisal process is standardized, streamlined, easy to implement and achieves great end-user adoption, the mission is accomplished and everyone wins. Today, BKD's employees have a clearer understanding of expectations and work with defined goals. Their clients benefit from working with qualified and engaged professionals who deliver results. That all adds up to good business.



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