

Meeting the Performance Management Challenge

How one federal agency earned recognition as “the model performance-based organization”

Pilot Software Customer Snapshot

Category: Federal government

Company profile: Central source for buying goods and services; secures buildings, products, services, technology and other workplace essentials for federal agencies

Products used: Pilot’s performance management framework: scorecards; analysis & reporting components

Users: Approximately 14,000, both business and technical, in three services, nine staff and 12 regional offices; one of the few enterprise-wide solutions in full operation within the federal government

Challenges:

- Managing agency effectiveness in meeting strategic goals
- Improving agency performance to meet the President’s Management Agenda by becoming more citizen-centered, results-oriented and market-based

Benefits achieved:

- Better alignment of agency-wide execution to ensure day-to-day tactics support agency goals
- Immediate access to scorecards that reflect agency progress toward strategic goals, enabling prompt action to address issues

Integrated with: Pegasus (Oracle 9i); Financial Management Information System (Oracle 9i); Comprehensive Human Resources Integrated System (Oracle 9i); Microsoft® Access, Microsoft Excel

Poised for the PMA challenge

When the federal government issued its President’s Management Agenda (PMA) challenging federal agencies to become more citizen-centered, results-oriented and market-based, this federal agency was poised to respond.

Accountability already engrained in its culture, the agency had been diligently monitoring and analyzing its financial data for 18 years with solutions developed by Pilot® Software. Using a version of Pilot’s browser-based analysis & reporting software that has been customized to the agency’s particular needs, the agency produces summarized financial information that is used for management reporting across the agency. The system contains 25 pre-defined business databases and performs calculations to produce trend analysis and comparative data for a three-year time period.

During initial deployment, the Pilot system quickly began proving its value, as it efficiently accommodated the agency’s diverse and deep business model, providing a functional system within a matter of just a few months and delivering very large models at minimal cost.

With an advanced ability to visualize, digest and analyze financial information, continued use of Pilot delivered additional value and return on investment to the agency.

Taking accountability to the next level

When, after nearly two decades successfully using Pilot’s software for financial analysis, the agency sought a performance management solution to take its analysis to the next level and help it meet the President’s Management Agenda, Pilot Software naturally made the short list.

In order to meet the PMA, support its strategic initiatives and effectively manage performance throughout the organization, this agency sought a Balanced Scorecard Collaborative Certified™ technology solution that also provided flexibility and a streamlined interface accessible to its non-technical users. The agency ultimately selected Pilot’s scorecard component to support its performance management needs. From this agency’s perspective, Pilot provided several advantages over the competition, not the least of which was the fact that the agency had been using Pilot’s solutions successfully for so many years already. Understanding the technological advantages Pilot Software offers, the agency felt confident that their performance management initiatives could benefit from them as their financial initiatives had. Also critical in the decision was Pilot’s clean, accessible interface that empowered the agency’s users – non-technical and technical alike – to readily use the information, enabling effective performance management at every level of the agency. As with the initial deployment of Pilot’s analysis & reporting component, the agency also realized the benefits of Pilot’s rapid deployment and cost-effectiveness.

Managers can easily understand the latest agency performance using Pilot's intuitive scorecards, which color-code performance outcomes to the degree that they are supporting and meeting agency objectives. Underperforming measures are noted with red (stop), while those verging on trouble are noted in amber (caution) and measures meeting objectives are highlighted in green (go).

The agency's addition of Pilot's scorecard solution to its thriving financial analysis & reporting system enables it to go beyond mere measuring and monitoring to more actively manage agency performance against pre-defined goals and objectives, born of a common agency strategy. Building on its agency mission to help federal agencies better serve the public by offering, at best value, superior workplaces, expert solutions, acquisitions services and management policies, this federal agency established specific performance goals and measures that aim to make its business processes more efficient and effective and management more accountable. Among the agency's goals are providing the best value for customer agencies and taxpayers, achieving responsible asset management, operating efficiently and effectively, ensuring financial accountability, maintaining a world-class workforce and workplace, and carrying out social, environmental and other responsibilities as a federal agency.



Sample Strategy Plan Based on Agency Mission and Goals

Aligning agency-wide execution with agency strategy

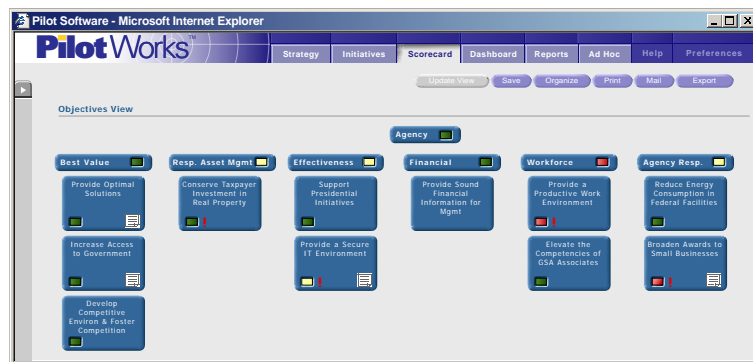
The Pilot system delivers the latest agency performance information to users throughout the agency's 12 regions via the agency's intranet. Using a Balanced Scorecard approach, the agency manages the performance of its major business lines. More than 900 measures – such as operational fund reinvestment, customer satisfaction, credit card delinquency, and small business set-aside procurements – from every region, service and staff office, are tracked using the system. Managers can easily understand the latest agency performance using Pilot's intuitive scorecards, which color-code performance outcomes to the degree that they are supporting and meeting agency objectives. Underperforming measures are noted with red (stop), while those verging on trouble are noted in amber (caution) and measures meeting objectives are highlighted in green (go). In addition to scorecard ratings, the system also provides the ability to track initiatives and benchmark trends.

As one of the few enterprise-wide performance management applications in full operation within the federal government, the successful Pilot system has helped the agency win recognition as a government leader in performance management and earn the title of “the model performance-based organization” within the federal sector.

Further facilitating efficient and effective collaboration throughout the agency is the Pilot system’s support for comments associated with operational objectives and performance – enhanced functionality added to the Pilot system specifically at the request of the agency’s users.

Besides sharing information through the browser-based system interface, managers can export performance data to the familiar Microsoft® Word and Excel formats, allowing users to choose whatever presentation format makes the most sense for the user and situation at hand.

Even in the early stages of the scorecard implementation, the agency is already beginning to realize benefits from the Pilot system. Just one example relates to the development of the agency’s annual performance plan. An extensive, in-depth look at the agency’s performance on hundreds of specific goals and related measures – everything from improving customer satisfaction scores to maintaining competitive lease rates to reducing energy consumption in agency facilities – the annual performance plan historically had been a labor-intensive process representing months of work. Now, with the Pilot performance management solution in place, detailed information on the agency’s performance against these goals and measures is at the fingertips of users throughout the agency. This ready access to visibility on agency performance in turn is dramatically reducing the time and effort required to produce the mission-critical annual performance report.



Pilot Scorecard

A recognized leader in federal performance management

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The agency – working with government specialists at Carson Associates, the Pilot partner who has been integral to the agency’s implementation of its Pilot system – plans to build on its initial success and implement additional system enhancements, including Web-based data entry and editing and custom report generation.

More Information

For more information about Pilot’s operational performance management solutions for government, visit www.pilotsoftware.com/government or contact us at info@pilotsoftware.com.