Advancing the Goal:
Each and every one, each and every day

A Case Study

Customer Snapshot

Industry: Aviation

Mission: To provide airspace safety, efficiency and capacity to users of aviation through state-of-the-art tracking and guidance.

PilotWorks components: Started with strategy plans & pathways and initiative management & prioritization; recently added scorecards; soon will add dashboards.

Initial deployment: 3 weeks

Number of users: 25 (half of current employees)

Benefits:
- **More focused planning**: Reduced strategy planning time by 50%.
- **Operational alignment**: A systematic way to continually meet business goals leveraging all organizational resources.
- **Less data to track**: Pilot's unique approach has helped the company reduce KPIs tracked by 42%.
- **Accessibility**: Easy access for all stakeholders, essential to alignment; saves on maintenance as all can enter their own updates.
- **Corporate memory**: Better individual and institutional learning.

ROI analysis: Recognizing the value PilotWorks provides beyond a specific calculation, the company's chief financial officer asks, "What would it be worth to you if everyone on your team actually did the most important things they could do to move closer to the goal each and every day?"

Recognizing the need for organizational alignment

With a mission to provide airspace safety, efficiency and capacity to users of aviation through state-of-the-art tracking and guidance, optimization is at the core of everything this organization does. For the company itself, optimization is the driving force ensuring discipline and processes that develop people and deliver consistent and predictable results — ultimately leading to the realization of company goals and mission.

Unlike so many organizations that declare similar lofty intentions yet struggle to translate them into action, this aviation company understood early on the need for organizational alignment in order to make good on its goals. Knowing that company goals will only be achieved when everyone understands their daily role in meeting them — and that sustained commitment requires frequent team engagement and accountability so employees will take goals more seriously — the company realized they needed a tool to help them accomplish these things.

Toward this end, the company initially invested much time and energy into a homegrown solution comprised of Excel spreadsheets and an Access database designed to help employees understand how their work contributes to the attainment of corporate goals. This new way of doing business, in which operational alignment was the ultimate goal, proved to be right on the money. More than ever, employees were knowingly choosing to do the right work because they had better insight into the goals.

However, as the company began to grow, so did its need for a more robust technology solution to help it continue to align resources with corporate goals. The company found what they were looking for in PilotWorks, Pilot's operational performance management solution. PilotWorks offered exactly what the company sought: a scalable solution to align resources with strategy. Specifically, PilotWorks would help the company:

- Clarify and achieve alignment toward organizational goals.
- Translate goals into specific actions.
- Get "buy-in" on organizational goals.
- Keep score, report, re-engage and recommit frequently.

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Rolling out incrementally to ensure success

Taking an incremental approach in order to test and refine the solution, encourage acceptance and ensure a successful widespread rollout, the company initially started with just PilotWorks' strategy and initiatives components. Within three weeks, the company's initial group — consisting of 10 power users in the finance department — was up and running. The main goal of this initial testing period was to transform these initial power users into "change agents" who would later help with wide-scale user adoption.

Now, the company has rolled out the system to a total of 25 users — half its employees — in addition to adding PilotWorks' scorecard component to the mix (PilotWorks' dashboards are to be added soon).

Reaping the benefits — after just months!

After just months, the company is excited about the benefits it has realized thus far, which extend company-wide across planning — both short- and long-term — and execution, with tangible results.

More focused planning

With the structure PilotWorks' strategy plan capabilities provide, the organization has found not only that they are able to get "out of the weeds" and cut strategy session planning time in half; moreover, they arrive at a plan that is better thought-out and executable than plans created via whiteboard scratchings. In addition, PilotWorks' unique pathways features — unlike anything the company had ever seen elsewhere in the market — help the team visualize where it is heading over the long-term, which interim phases will help it get there, and which objectives play primary contributory roles in each phase.

While the strategy plan tells the story of *what* the company hopes to achieve, PilotWorks' initiatives capabilities help the company tell the story of *how* it will achieve its objectives using the resources it has. Equally important, initiatives in PilotWorks help facilitate cultural adoption of the strategy, fostering buy-in from employees as they are given the opportunity to provide feedback.

> *"What would it be worth to you if everyone on your team actually did the most important things they could do to move closer to the goal each and every day?"*

Operational alignment

Using the PilotWorks system holistically and organization-wide has helped the company achieve its goal of operational alignment. With a user interface suitable to all types of users — from executives to power users to line-of-business users — the PilotWorks system's approachability makes it easily integrated into all employees' workdays. With all stakeholders are using the same system, the company now has a common repository of data, and therefore a common language, so it can be confident that the entire team is working effectively toward the same goals.

Pilot's methodical approach to increasing operational alignment is already proving to help this aviation company meet its strategic goals. For example, one of the company's goals is to maximize profitability through customer satisfaction. Using PilotWorks, the company was

able to determine that insufficient spare equipment was affecting its customer satisfaction rate. With clear insight into the corporate strategy via the PilotWorks system, the company knew that the insufficient spare equipment issue had a direct impact on customer satisfaction, which in turn had a direct impact on revenue. It immediately deployed the necessary resources to address the root issue, and is now at 98% of its spare equipment requirement (up from 35%). Customer satisfaction has subsequently risen, helping the company get one step closer to attaining its strategic goal of maximizing profitability through customer satisfaction.

Less data to track
Recognizing that "if you are not keeping score, you are not really in the game," the company recently added PilotWorks' scorecard component to its performance management system. Pilot's unique approach, which starts with objectives rather than data, enabled the company to limit the number of KPIs it was tracking — reducing the number by 42%. By taking this approach, the company was able to avoid overwhelming its team with irrelevant reports or data. With scorecards in place, the company now can see ongoing progress toward its goals and make quick corrective changes before it is too late. The addition of PilotWorks' personalized, role-based dashboards in the near future will further complement the company's performance management capabilities, providing users with the ability to create an unlimited number of dashboards tailored to specific objectives, individuals or groups, delivering directly relevant information to users.

Accessibility
Whereas accessibility was an issue previously, with PilotWorks' browser-based solution, the entire team not only has the easy access to the solution that is so essential to alignment; moreover, the company saves on maintenance as everyone can enter their own updates. Spending less time on alignment issues and maintenance, thanks to PilotWorks, the company can now spend more time addressing business planning issues.

Corporate memory
Out of the box, PilotWorks has provided this aviation company tremendous value and will only increase in importance as the company continues to use the system. PilotWorks is designed to exponentially increase in value so that the longer the system is used, the more critical it becomes to an organization; to this company, PilotWorks is analogous to its "corporate" memory. In the future, the company also plans to use PilotWorks for board meetings and operational meetings/reviews — both of which are mission-critical to the company's success.

Recognizing the value PilotWorks provides beyond a specific calculation, the company's chief financial officer asks, "What would it be worth to you if everyone on your team actually did the most important things they could do to move closer to the goal each and every day?"