

# Keys to PI Implementation Success

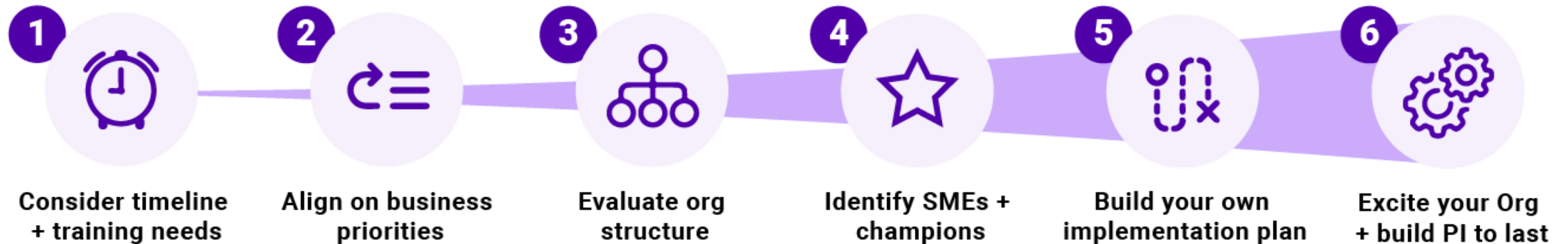
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# Implementation Success Overview

The belief that your people are your most valuable asset is what brought your organization to The Predictive Index. Using talent optimization principles, you can actually map people to a strategy, and have a framework for hiring purposefully, inspiring and motivating your people effectively all through PI's tools.

Success with PI is a combination of quick wins and long-term planning. The following playbook is designed to guide you through successful implementation & ensure long-term success with The Predictive Index.



# Implementation Success Goal Tracker

Strategic Goal	Who is responsible (ELT+1, units, teams?)	Success Metrics	What is at stake (\$'000 vs. \$M)
(1) Consider timeline + training needs			
(2) Align on business priorities			
(3) Evaluate org structure			
(4) Identify SMEs + Champions			
(5) Build implementation plan			
(6) Excite your org + build PI to last			

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# Consider timeline + training needs (\$)

## You've made the investment in The Predictive Index to optimize talent at your organization. Congrats! Now what?

There's not a one-size-fits-all approach to introducing PI to an organization. Consider how to structure the rollout in a way that best suits your current and future employees:

- What is the organization's deadline for implementation? Start by identifying the desired completion date and work your way backwards.
- What are quick wins for the next 30-, 60-, and 90-days? These could include PI training for key stakeholders and future champions; assessing employees, etc. What logistical or scheduling barriers may exist with getting those groups trained & assessed?
- What other competing priorities/initiatives at your organization are planned for the next 6 months? How will these interact or interfere with PI?

Work with your PI Consultant to strategize & provide recommendations.

PI implementation timelines can vary greatly depending on scope and complexity of your business.

- For example, if you plan to use PI for hiring, expect that you can be up and running in as little as 1-week.
- If you bring The Predictive Index into your highly complex organization to optimize individuals, managers, teams, and strategy, a full implementation could take as much as 12 months.

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# Consider timeline + training needs (\$)

Milestone	Who is responsible?	Due Date
Identify desired completion date; work backwards to start date		
Identify quick wins for 30- 60- and 90-days		
Identify potential hurdles/roadblocks		



# Align on priorities + define success

## The most successful PI implementations start with C-Suite and Executive alignment.

- Consider working with your PI Consultant to leverage the **Strategy Insights** within PI's Team Work Styles tool.
- A few key factors to consider when gaining agreement:
  - What key stakeholders are critical for early buy-in? Who is our executive sponsor? (C-Suite)
  - What barriers may exist to prioritizing PI's implementation this quarter?
  - What are our urgent business priorities & where should we focus our PI efforts first (hiring, team dynamics, manager/leadership development, etc.)
  - What are our longer-term business goals and how do we map our people strategy to them?
- Define success by identifying key metrics or indicators to allow your team to monitor progress & show results. In 1 year, what do you want to accomplish? Where will you move the needle?
- From there, align on quick wins & work with your PI Consultant to build into early plans.

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## Align on priorities + define success

Milestone	Who is responsible?	Due Date
Define stakeholders + identify Executive Sponsor		
Review/address barriers to success		
Identify urgent business priority for initial focus (strategic planning, hiring, team development, employee experience, etc.)		
Identify success metrics		
Identify quick wins/short-term goals		



# Evaluate org structure

**Now that you have executive alignment, it's time to assess the flow of information from the top down.**

You want to make a strong first impression when bringing PI to your current and future employees, so it's critical that the correct parties are informed advocates for this talent optimization initiative. Here are a few personnel factors to consider:

- Do you currently use assessments or development tools at your organization? How will you make PI's talent optimization solution value distinct and clear?
- Are there priority departments, teams, or project groups on which you should focus first?
- Are there upcoming all-company meetings? Regular departmental meetings? These can be used to empower PI champions within your organization to introduce the solution to your teams.
- Who is your PI implementation team? Take the opportunity to optimize your talent and create leaders at every level, across different departments within your org structure.



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# Evaluate org structure

Milestone	Who is responsible?	Due Date
Finalize talk track/communications for introducing PI to your organization (Hint: How will you make PI's talent optimization solution value distinct & clear to your employees?)		
Identify if there are departments, teams, or project groups to prioritize for initial focus		
Identify meeting/event to introduce PI to your organization (town hall, quarterly meeting, department meeting, etc.)		
Form your PI implementation team		



# Identify SMEs + Champions

**Amplify PI's presence across the organization through a team of internal experts & champions.**

- Consider these types of roles when identifying your subject matter experts (SMEs):
  - C-Suite (COO, CAO, CHRO/CPO, CEO, etc.)
  - Department or Business Unit leaders
  - Rising people managers (development opportunities)
  - Talent Acquisition team + HR Operations
- **Why is this important?**
  - The benefit of having a wide range of roles & levels represented in your implementation team includes an alleviated administrative burden on a single team or person.
  - With more people throughout the organization trained to answer questions, advocate for the PI solution, and apply PI knowledge/recommendations within their departments & teams, the better positioned your company will be to have engaged, productive, high-performing employees.
- In step one, you outlined what resources are available to allocate to training expenses. The final action for this step is to identify the most efficient and expedient way to get your SMEs to their 2-day Workshop.

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# Identify SMEs + Champions

Milestone	Who is responsible?	Due Date
Identify Subject Matter Experts (SMEs) and PI Champions within departments across your organization		
Identify timeline for these SMEs/Champions to attend PI Training: <ul style="list-style-type: none"><li>- 2-day Drive Results with Talent</li><li>- 1-day Manager Training</li></ul>		
Align on budget for additional training as needed		

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# Build Implementation Plan

You've now set a goal for your deadline, finalized your budget, gathered information about business priorities, and identified subject matter experts and champions throughout your organization. *Now, it's time to take action.*

Set specific, measurable goals that align to the information you've gathered, and assign owners for each initiative. On the right are key milestones recommended by PI based on successful clients' best practices (next slide)

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# Build Implementation Plan

Milestone	Who is responsible?	Due Date
<a href="#">2-day Workshop complete</a>		
<a href="#">1-day Manager Training complete</a>		
<a href="#">Communication Plan finalized</a>		
<a href="#">Entire organization assessed</a>		
<a href="#">PI tools incorporated into 1:1s</a>		
<a href="#">Job Targets for all open roles complete</a>		
<a href="#">Team Work Styles for each dept complete</a>		
<a href="#">PI tools incorporated into hiring process complete</a>		
Strategy Assessment with Exec Team complete		
<a href="#">PI XP Complete</a>		



# Excite your org + build PI to last

**The key to long-term success is making your commitment to optimizing talent part of the fabric of your organization.**

- Build PI tools and solutions into all parts of your business to ensure employees are operating from the same foundational understanding & goals:
- Visit our software [Getting Started Guide](#) to build the foundation for long-term success, including: Adding New Users, Folder Structure Best Practices, Creating Groups
- Here are some examples of how PI can take your business to the next level:
  - [Lunch & Learn Presentation](#) + [Intro Email](#)
  - [ATS Integration](#)
  - [PI in the Employee Lifecycle](#):
  - [Annual Reviews](#)
  - [Personal Development](#)
  - [1:1 + Team Meetings](#)
  - [Strategy Insights: Process + Tips](#)
  - [Employee Experience Survey](#)